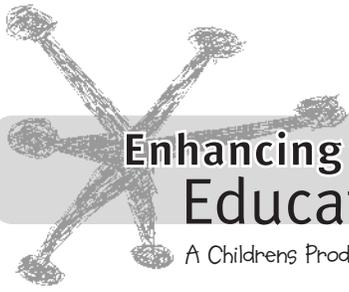**Enhancing**
Education
A Childrens Producer's Guide

The Educational Outreach Development Process

As you begin working on your production proposal and are articulating your program's goals, basic structure, and content focus, it's time to consider your educational outreach plan. This is the best time to bring in educational consultants (either within your station or presenting station, or through an educational outreach consultant). Here's the basic development process:

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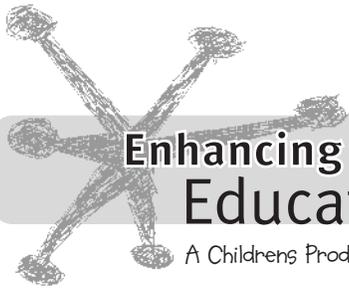
Process

Defining Audience & Goals

As you refine your program's goals, structure, and content, you will also be developing your educational outreach plan. Before you can proceed, you must first define the goals, objectives, and audience for your educational outreach elements. What audience(s) would you like to reach, and what messages, experience, or content do you want them to come away with or master?

Goals define the ultimate purpose of your project. They tend to be abstract and broad in scope. For example, your goal may be to improve children's literacy skills or to increase children's awareness and appreciation of the diversity in their community.

Objectives, on the other hand, are more specific and concrete. They describe what you believe you can reasonably achieve through your project. For example, in a program built on an underlying literacy curriculum, you might state that "kindergarten and first-grade students will improve their phonemic awareness" or "be more interested in reading books." You can later use your evaluation to measure how effectively you've reached your objectives.

An integral part of defining your goals and objectives is determining your target audience(s). You can't define one without the other. In fact, you must have a well-defined target audience in order to know what content to develop and how best to get it to those you want to reach.

Keep your goals, objectives, and audience as focused as possible. While you may decide to target more than one audience through different elements of your plan, you run the risk of overextending your limited resources. This is especially true when the interests of different funders tempt you to develop potentially incompatible goals and target audiences. Children's continuing series offer a unique opportunity to build and expand your outreach audiences over time. You don't have to reach everybody the first season.

Process

Collaborating with Partners

Partnerships are essential in educational outreach. Partners help you reach your target audience and define your educational goals. They can offer vital information about your audience and help you create appropriate materials, or provide you with existing materials that they have created for the same audience on the same topic area. Partners can help you define your educational content and provide the content expertise you need, and they can also enhance your credibility with funders and with your target audience.

So what are the steps to establishing and working effectively with partners?

Identify Potential Partners
What organizations serve your target audience? Educational and early childhood organizations, like the International Reading Association or the National Association for the Education of Young Children (NAEYC), are obvious places to start if you're targeting teachers and child care workers.

If you are interested in informal education, start by thinking about whom you want to reach. What is your target age group? Are you aiming at a particular socioeconomic group or at an audience in a particular region? What are the local PTV stations in that region, and what kinds of educational projects are they involved in? What is the best setting for reaching your target audience? Where do you find third- and fourth-grade girls, for example? Are there national networks you could tap into? If you are interested in museums, you might contact the Association of Youth Museums or the Association of Science-Technology Centers. If you want to work with after-school programs, you might contact Boys & Girls Clubs of America, YMCA or YWCA, Girl Scouts or Boy Scouts, 4-H, or Camp Fire Boys and Girls.

Before you contact your potential partners, you need to know who they are and where they stand on key issues. Visit their Web site(s) to find out about their programs. Ask colleagues who have worked on similar projects if they have worked with this partner, and if so, what was the result? What did the partner bring to the table? Did the partner follow through? Did communication flow well? Were there any misunderstandings or surprises? How would they summarize the ultimate value of the partnership? Ask yourself why this partner would want to be part of this project. What does your organization or the project offer that helps this partner meet its mission or organizational goals?

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Process

Collaborating with Partners (cont'd)

Pick Up the Phone
The earlier you involve partners, the better your relationship and your outcomes will be. Your potential partner's national office can connect you with a network of community-based affiliates. Partners can serve as a distribution avenue, and they can build awareness about your project among their constituents through their various communication vehicles.

Tell potential partners about your project and your ideas for collaboration, and ask them for their input and ideas. Organizations that are brought on once everything is set in stone can feel used and may make little effort to help you beyond the basics. Set up a face-to-face meeting if you've never met. It builds trust and personal connection.

Clarify Expectations
Make sure you both understand the goals of your partnership and what each of you is going to do and provide. Clarify up front the partner's level of involvement and the extent of editorial input or control the partner expects.

Put It in Writing
If money will be changing hands, make sure there is a contract or letter of agreement. Even if the partnership is more casual, having something in writing will make everyone feel more comfortable and protects all parties' interests.

Establish Good Communication
The key to good partnerships is communication. If you have multiple partners, think about ways to keep them all in the loop, possibly through periodic conference calls or a listserv.

Share project resources as you create them. Get partners' feedback, if appropriate. Let them know what's going on behind the scenes.

Close the Loop
Always share evaluation results and final reports with your partners. Send them a set of the final videos and other project-related resources for their records. Make sure each partner feels like a full member of the project. You may want to work with them again someday.

Process: Collaborating with Partners

Working with Public Television Stations

Local public television stations can be one of your strongest educational outreach partners, helping to bring your project to communities across the country, connecting national partners to community coalitions, and distributing your materials to your target audience.

Stations vary widely in their involvement in educational outreach. Some stations focus primarily on Ready To Learn, which provides services to children up to 8 years old. Others, particularly statewide networks, provide significant school-based support through instructional video, teacher training, and their educational services departments. Still others provide services to adults and lifelong learners. And many serve as community catalysts, pulling together coalitions of local organizations around specific issues.

The National Center for Outreach (NCO) recently commissioned a survey of outreach services at public television stations in order to define the "state of the state" for outreach. You can download a PDF of the survey at www.nationaloutreach.org. According to this survey, outreach services are housed in a variety of different station departments:
- 13 percent of stations have departments exclusively dedicated to outreach services
- 35 percent are located in Education departments
- 26 percent are located in Promotions/Communications departments

So when working with a station, it's important that you identify which department can provide you the assistance you need.

In the fall of 2000, the Independent Television Service (ITVS) convened two separate focus groups of public television outreach staff. Twenty-eight participants representing stations in 20 states attended. You may find the ITVS focus group report helpful as you think about what resources to make available to stations.

Demands on outreach staff are competing and ever-changing. As the report notes, "Outreach is a discipline with fuzzy edges, open to interpretation and re-negotiation at the level of the individual station." As one woman reported: "I have never seen a job description for my position. It just keeps growing and growing." This reality is not meant to scare you away from using local public television stations as a resource and partner. Rather, armed with this information, you will be able to better work with stations by providing them the resources and support that they need. They can then be your keys to the city!
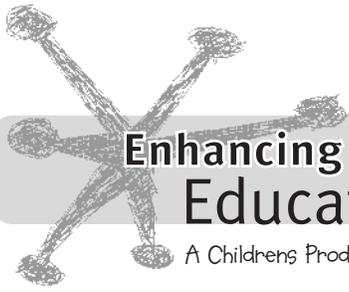
Process: Collaborating with Partners

Working with Public Television Stations (cont'd)

You can reach stations either through your presenting station, if you are using one, or through PBS Ready To Learn's mailing list of Ready To Learn coordinators. The NCO's mailing list of station outreach staff is another resource. (These lists overlap but are not identical.) Resources that you or your educational outreach manager can offer stations include the following:

- Copies of all series resources, such as print materials, press kits, and series backgrounders, that will help stations understand your project and consider how to best support the needs of their community
- Multiple copies of educational resources related to your project that they can distribute locally, as well as a workshop kit including background information, agendas, and talking points for running workshops with different audiences
- Suggestions for the types of local educational outreach projects they may want to consider launching
- Information about national partners with local chapters with whom they might be interested in partnering
- Stipends to support their outreach efforts

To offer stipends, you will want to send a Request for Proposal (RFP) to the station's Ready To Learn educational outreach staff asking them to propose what they will do. The size of the stipend will depend on your budget and the magnitude of your expectations for local activities. As more and more projects offer stations stipends (generally ranging from $1,000 to $15,000, with most in the $2,000 to $5,000 range), you will be entering a somewhat competitive environment. The more you can offer, the more appealing your project may be. You don't, however, need to put your whole budget into stipends to interest stations in your project. Ultimately, the reason stations embrace your project may be that your project supports an existing outreach initiative or partnership, that your project has the potential to address an important community need, or that you are offering a rich array of accompanying resources.
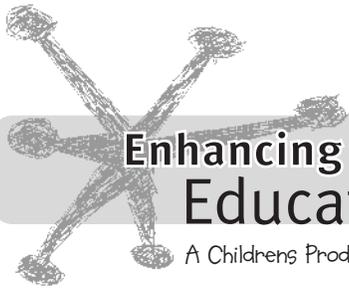
Process: Collaborating with Partners

Educational Organizations

Educational organizations are excellent resources for your educational outreach initiatives. They have communication vehicles, such as magazines, newsletters, Web sites, listservs, and conferences; they have information about best practices, current research, and national curriculum standards; and they can provide credibility to your project by being formal partners. It's best if they are brought into the production early in the process when the educational material is being conceptualized. The earlier you bring educational organizations in, the more likely it is that they will feel true ownership for the project and invest their own resources in making your project a success.

You can find an educational organization supporting any curriculum area or age group, including the National Association for the Education of Young Children (NAEYC), National Education Association (NEA, which recently began working with preschool educators), National Science Teachers Association (NSTA), National Council of Teachers of English (NCTE), International Reading Association, and National Council for the Social Studies (NCSS). The National Staff Development Council (NSDC) provides information and standards for teacher professional development, and the International Society for Technology in Education (ISTE) can help with resources and standards for educational technology professionals.

Education Week, the weekly education newspaper, has put together a useful listing of all the major organizations involved in education with links to their home pages.

Process: Collaborating with Partners

Working with Parents

Families are often the end users of educational outreach materials and resources, particularly in projects targeting young children. Working with families in mind can greatly enhance your plan, as well as provide important information and resources. Yet working with parents is a challenge, as it is often difficult to reach and involve them in educational efforts. Defining your goals for this audience is critical, as these goals will significantly affect the shape of your efforts, help define your content and evaluation measures, help you determine the best ways to reach families, and ultimately shape the strategies you use to work with them.

If you are considering families as your target audience, there are some critical questions to explore. Why do you want to work with parents? How will working with parents help you achieve your goals? How can you work with parents to optimize achieving these goals? And, significantly, what action do you want parents to take, and is this action realistic? For instance, you may want to help parents support their children's skill development in a specific area, such as literacy or science, or you may want to improve parenting skills in a particular area by providing background information on early childhood development. How do you ensure that parents will do what you want them to do (e.g., use your resources in the timeframe you define)? Given that an audience of parents is such a broad one to target, do you need to define a subset more narrowly?

Because parents are extremely busy and have conflicting demands on their time and energy, you need to provide compelling reasons why they should invest their limited resources in your project. This is your "benefits" list. It defines what it is about your project or resources that will help parents be better parents or help their children do better in school, be healthier, or improve their social skills. This is the hook. In developing your benefits list, remember that all parents want the best for their children. They are likely to respond positively to efforts that appeal to this desire. Be clear, concise, and explicit. Help them understand how your project contributes to their children's healthy growth and development, why it is important, what resources are available and what support your project provides, and how the parents' participation supports the process. In addition, give them a clear idea of their role and your expectations in the project. No one likes open-ended time commitments; you need to provide specific dates and times when their services will be needed. Try to provide them with different ways to participate that integrate easily into their already hectic lives.

Process: Collaborating with Partners

Working with Parents (cont'd)

Where To Find Parents
Now that you have clarified what you want from parents and what you will provide, how do you locate them? Finding parents is not as easy as it may seem. It's made even more difficult by the fact that you'll usually want a diverse group of individuals that represent the audience you are trying to serve. Don't reinvent the wheel. One of the most effective ways to reach parents is by partnering with agencies, institutions, and organizations that work with parents on an ongoing basis. Integrate your outreach efforts into their existing programs, and use their expertise to help you develop appropriate content for the target families. The staffs of these organizations bring invaluable firsthand experiences in working with the parents. They can be key to promoting parent participation since they understand the needs of the population, already have a relationship with parents, and often share a common background and experiences with them.

Some things to consider: Are you trying to reach parents with children in a particular age group? What is the socioeconomic or literacy level of the families you want to reach? Do you need ongoing or one-time-only contact with families?

Preschools, elementary schools, and after-school programs are good places to reach parents of younger children. Another approach is through informal education organizations where parents tend to volunteer, such as Girl Scouts or Boy Scouts, 4-H Councils, museums, libraries, and sports teams. Home schoolers can also be an important audience for your resources. There are several national educational organizations that work with home schoolers, including the Home School Legal Defense Association, National Home Education Network, and National Home Education Research Institute. And finally, the Ready To Learn coordinators at individual public television stations are among your most valuable resources for reaching parents. Most of them target parents, among other audiences, for their workshops, events, and communications.
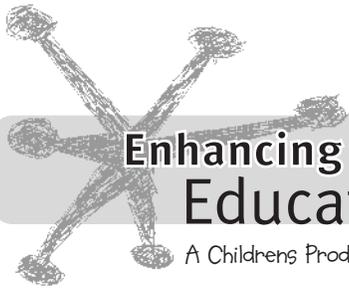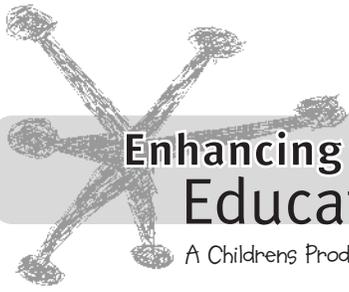
Process

Defining Educational Content

Before you define the educational material you plan to develop, be sure that you have clarified your project's target audience, goals, and objectives. In fact, since your entire project should reflect the same educational goals, you should go through this process at the beginning of the series' development. The process described here applies to any media you may decide to produce.

Begin by doing some research about the educational needs of your audience, both the child viewers and the adults who support them. You'll need to determine what kind of content will help your audience better understand the subject of your program and truly be useful to them. Here are some approaches you can take to this research:

- Check out national or state educational standards for the grade level you are targeting. Teachers generally are most concerned with their local or state standards, so, if you can identify localities that matter to your project, you might look at those. Otherwise, look at national standards. Even if you plan to focus on an informal educational audience, it's still important to align your content with what kids will be learning in school. Refer to the Research & Resources section to get you started.

- Do a quick search of what else is out there on your subject. You can do a Web search, look at some educational catalogues, or scan popular child development books.

- Hold a focus group of local educators who meet the profile of your target. Ask them what they commonly cover in your area, or what topics are difficult to teach or lacking in media support. Run some of your educational strategies by them and ask them to prioritize them. See if friends in other states can connect you with teachers in their area you can get in touch with via phone or e-mail to gain a wider perspective. But remember to balance your findings with what else you can determine about trends and reform efforts in that subject area, especially if you're hoping to initiate some change as to how your subject is handled.

- If you are targeting an informal education audience, hold a focus group of after-school providers, librarians, child care givers, museum educators, and others who work with your target audience. Find out about the basic structure of their programs and what particular issues pertain to the students they work with. For example, many after-school programs have drop-in populations, so it is more difficult for them to do long-term programs. Moreover, their staff may be paraprofessionals who have little formal educational training. Thus, they may require more explicit and structured materials, as well as greater support on your part.
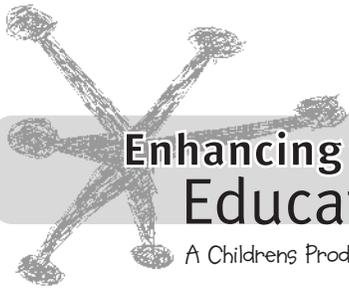
Process

Defining Educational Content (cont'd)

- Talk to national educational organizations to get their feedback and recommendations for advisors. If you are targeting students in informal education settings, talk to the professional association or national office connected to your target audience (such as the Association of Science-Technology Centers, the Association of Youth Museums, the American Library Association, the national office of Boys & Girls Clubs of America, YMCA/YWCA, or Boy Scouts/Girl Scouts) to discuss your project and to get suggestions for advisors.

- Talk to an educational consultant in your area. You may want to begin by contacting the subject-area coordinator in your local school district to find the names of local people they trust.

By the end of this process, you should have a clearer idea of which content topics and educational strategies you'll want to cover in your educational materials. You'll be able to use these as a starting point as you work with curriculum developers, writers, advisors, reviewers, and editors to actually produce scripts and manuscripts for your materials.

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Process: Defining Educational Content

Working with Advisors

Advisors are essential to any project. They provide guidance as you develop content and offer advice on the best ways to reach your target audience. They are your experts. Advisors can be such a valuable resource for you that it is important to think carefully about the types of people you want for advisors and how you want to use them.

Some advisory boards, convened primarily for the benefit of funders, are made up of "big names." While their names can help open doors for you, they often don't have the time to commit to your project beyond giving it their stamp of approval. If you need to have such advisors for funding purposes, think about balancing them with people who you know can give you real, constructive feedback.

The best projects have advisory boards that span all the pieces, from planning to production to program outreach. Increasingly, funders require common advisory boards. Having one advisory board ensures that the different elements will be integrated and consistent. You will, however, rapidly burn out your advisors if you require them to review every element of a project. Therefore, the best strategy is to establish a central advisory board and then to spread responsibility across the board depending on the individual advisors' skills, interests, and specialties. You may want to have one key advisor responsible for content across the project, but this person should be compensated at a much higher rate than your other advisors.

You might also consider having a national advisory board, which includes individuals representing both your project's content area and the target audience(s) — essentially a joint production/outreach board. You could then have an additional local board made up of individuals in the trenches, people who can give a more practical review of your materials and activities and who can commit to piloting parts of your project.

As with all partners, the key to working with advisors is to be clear about expectations. How much time will you need from them? Will there be meetings? Will you cover travel expenses? What volume of material will they be expected to review? When? And on what kind of turnaround schedule? What will be their compensation? Will it be an honorarium or an hourly rate? Again, as with partners, the sooner you can bring them on, the better. When you talk to potential advisors about your project, spend enough time listening to their opinions before you commit to them; this way, you can ensure that their input will be useful. Advisors figure out pretty quickly when their advice is being ignored routinely. This isn't a good use of their time or yours.

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Process

Choosing Appropriate Media

One challenge in developing the educational component of your project is deciding which media to use to accomplish your goals. Often, any number of media could be used to deliver the same or similar content. So how do you decide what your strategy should be?

Review the goals, objectives, and target audience for your educational outreach effort. Think about what each medium does well and how your audience might use each medium.

Now consider your budget and the technologies available to your target audience. You need to decide what is the best media for reaching your audience and what is the most cost-effective way to have the widest reach. Sometimes these are the same; sometimes they aren't — that's when you have to make compromises.

For example, using the Web as a print-distribution mechanism does not take advantage of its strengths, yet if you can't afford to print and mail your materials, this may be your only distribution option. Similarly, streaming video on the Web can be a great way to accomplish a broad reach, but many people won't be able to access the streaming or will find their computers too slow. You may want to consider distributing on CD-ROM, DVD, or videocassette as well.

For more information on the different educational outreach formats, see the following Formats areas: Print, Web/Interactive, Video, Person-to-Person Activities.

Because technology changes so quickly, any statement declaring the best use of any media would be out of date in months. The key is to learn as much as you can about your target audience. Find out what's really going on, not just what the statistics say. While most schools may be wired, computers may be located in the lab rather than in individual classrooms, and their network speeds may be limited. Many teachers still prefer getting printed materials over downloading guides from the Web, but this may change. And what works for teachers and schools may not work for preschools or libraries. You need to know your market and think critically about why you are choosing one medium over another. Whatever decision you make is fine, as long as you can justify it to yourself — and to your funders.

ZOOM serves as a useful illustration of a site that has chosen appropriate media for educational outreach. Like many of the projects featured on this outreach site, *ZOOM* uses the Web, video, print, and face-to-face training to accomplish its central goal of teaching science-related skills

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> *Process*

Choosing Appropriate Media (cont'd)

and concepts and creating lifelong, positive attitudes toward these subjects. In order to achieve this goal, the following educational outreach efforts were used to support the ZOOM Season 5 theme of engineering:

- An activity guide to help after-school providers, engineers, and other educators run a six-meeting ClubZOOM Engineering program with kids
- Video of the *ZOOM* cast welcoming young people to ClubZOOM and program segments showing the cast doing the activities featured in the activity guide
- Web site with interactive and offline engineering-related activities and other resources
- Training *ZOOM* engineers to work with kids at schools and in other community-based settings
- ZOOMlocal/national grants to public television stations to help cover production and other related costs incurred when inserting local content

Because the educational outreach components were so integrated and flexible, they were very complementary. For instance, although created primarily for engineers, the training materials could be easily adapted for other audiences. All educators (formal and informal) were able to use the "Welcome" video for both their own background and with the young people they work with. The Web site provided ongoing resources (in the form of a huge bank of activities) to educators. The ZOOMlocal grants helped public television stations nationwide reach out to and feature young people in their communities. These tightly targeted educational outreach media enabled the project to support teachers, youth-serving groups, and organizations in working with youths.

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Process

Budgeting & Scheduling

Planning your educational outreach campaign should happen as early as possible in the production process. Preferably, you will develop your educational outreach plan soon after you have written the concept for your program or series, at which point you will need to develop budgets and schedules for each element.

If you will be working with other staff to produce the various educational outreach elements (print, Web, video, etc.), this is the time to involve them and/or an educational outreach manager. They can develop budgets and schedules for their separate elements, which you can then incorporate into your overall project proposal with a master timeline and budget.

Determine the Budget
Discuss the scope and a target budget amount for each of your educational outreach elements with the consultants or departments who will be working on them. Let them figure out what they can do within the given budget, and include their estimates in your funding proposal.
If you develop specific budgets for the different elements without getting such input and then expect others to implement these elements, you may find that they cannot stick to the budget figures you've promised your funders.

So how do you come up with a target budget? Generally, educational outreach ranges from 10 percent to 30 percent of a production budget. At the high end, this might include a robust Web site and possibly professional development videos, along with curriculum development and fairly extensive implementation strategies. Some issues to consider include the following:

- **Who will you approach for funding?**
  If you plan to approach a particular funder for a large percentage of your project budget, talk with your project officer early in the development process, or carefully review the funder's guidelines and recently funded projects, to ascertain the level of educational outreach activity that they will expect. For example, the National Science Foundation (NSF) requires substantial educational outreach, as do many other foundations. If your educational outreach plan is seen as too limited, it could jeopardize funding for your whole project. Avoid developing a different plan for each funder, tailored to their specific interests. You don't want to let your funders cherry-pick your plan, or you could end up with lots of half-funded pieces.

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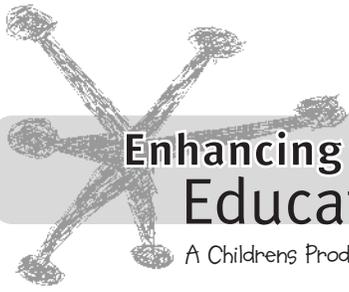
Process

Budgeting & Scheduling (cont'd)

- **How difficult will it be to raise money for your project?**
  If you believe you'll have difficulty raising money for your project (because the subject matter is controversial, for instance, or because it doesn't address issues currently in vogue among foundations), keep in mind that an exciting educational outreach campaign may open funding doors that might otherwise be shut. You may want to consult someone experienced in foundation or government fund-raising for suggestions of potential funders you may not have considered who might find your project exciting specifically because of the outreach component. You still need to be realistic, however, about how much money you can ultimately raise. You don't want to develop an extensive educational outreach campaign that makes your overall project unfundable.

- **Where does your project fall within core educational curricula?**
  You don't want to create a huge educational outreach campaign for a subject that is educationally marginal, even though the goal of your educational outreach might be to bring a controversial or seldom-taught subject more to the forefront. If you aren't sure how to figure out where your project fits in to the educational arena, refer to the Defining Educational Content section of this guide.

Create a Schedule
How does educational outreach fit into your project timeline? Generally, most of the "production" work on your educational outreach elements (including educational print materials, a Web site, or an online professional development course) happens on parallel production timelines three to 12 months before the series or program premiere. Many person-to-person activities, such as workshops and events, coincide with or happen after the series premiere, although the planning work occurs during the preceding months. The actual schedule for each outreach element needs to be developed individually, depending on project size and scope and the availability of series or program resources.
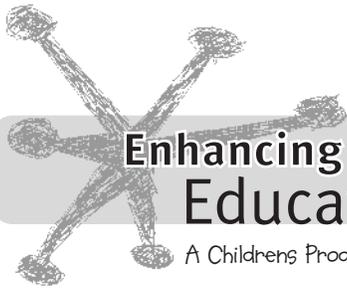
Process

Determining Rights Needs

As technology changes and creates new teaching environments, we need to examine the implications it has on the use of media and media assets. The technologies used today are evolving and changing, allowing for the expansion of how media can be used, repurposed, and distributed. They are also changing how you as a producer must think about the media assets you hold. You have toiled long and hard over your project — don't you want to get the greatest possible use out of the media, not just at this moment in time, but for as long as the information is useful?

Educational materials typically have been cleared for A/V usage. With the advent of the Internet, there's another category of rights you may need to clear. This is especially important if you want teachers and students to be able to use your materials at home.

For all of your new productions, make sure you clear rights for third-party materials, music, talent, etc. Clear as much as you can up front within your budgetary limits. It may be prohibitively expensive to clear your entire program for all categories of rights. If you need to be selective, think about which elements of your program(s) would be most useful for meeting your educational objectives, and clear or arrange options to clear those elements.

Web streaming and datacasting are technologies that change how teachers can use the content you are creating. Have you done all you need to do to make that material available for these new technologies? For example, have all of your on- and off-camera talent or those who provide copyrighted material for your project signed releases that will allow for use on the Web or through any other platforms or technologies (even those not yet existing)? Are your music rights licensed for new media? What about organizations that would like to use your material and make it available to schools through a datacast delivery system? Have you made sure that you can legally license your material to other organizations?

> *Process*

Evaluating Your Efforts

In today's increasingly businesslike world, with fewer dollars to go around, pure philanthropic giving is a thing of the past. Corporations, government agencies, and even foundations are taking a hard look at "Return on Investment" (ROI). They want to know more than Nielsen ratings and the number of individual visitors to your Web site. They are asking: "What difference did our dollars make? What impact did your efforts have?"

Nearly everyone involved in educational outreach has a treasured collection of anecdotes that attest to the value of what we do. But anecdotes aren't enough to convince funders, producers, or even ourselves that educational outreach has an important place in public broadcasting. Moreover, many funders, especially government agencies, require professional, third-party evaluations to document and justify the impact of federal, taxpayer dollars. The good news is that with a little forethought and planning, you can design your activities to include measurable objectives that can be evaluated effectively to determine reach and impact.

Ultimately, evaluation has two main goals:
• To generate information to help improve the effectiveness of your activities
• To demonstrate to you, your constituencies, and current and prospective funders the impact of your activities

Types of Evaluation
Evaluation can occur at three different phases of your project:

Front end
Assesses the knowledge, understanding, and needs of the target audience to serve as a baseline prior to component development. Front-end evaluation can also help shape some important design decisions further down the line. This can be accomplished through market research and focus groups.

Formative
Gauges the effectiveness of a component while it is in development. The information collected can inform changes in the activity and correct problems before it's too late. For example, a prototype Web feature, rough-cut video, or draft student activity can be used with small groups made up of members of your intended target audience to test usability, appeal, and learning outcomes. The data collected can help guide further revisions.

Process

Evaluating Your Efforts (cont'd)

Summative
Helps determine if you have achieved your goals and objectives. Have you reached your target audience? How many individuals did you reach? Have you helped them increase their knowledge of the subject? Are they able to apply this information to new situations? Have they benefited in some way by interacting with the educational outreach material?

Establishing Evaluation Objectives
Not all projects need in-depth front-end, formative, and summative evaluation for every activity or component. From the outset, you need to be aware of your goals and objectives and how you will measure your success. You need to have clearly articulated objectives for each educational outreach component and the project as a whole. Ask yourself: What do I want to achieve with this activity? What do I want end users to know, be able to do, or understand differently after interacting with this resource or activity?

Objectives can be precise and measurable (e.g., in pre- and post-participation surveys, students will demonstrate a significant increase in science process skills). Or they can be more subjective (e.g., the resources will encourage educators to integrate music into their classrooms more often). Even for this latter type of objective, there should be measurable results. For example, what percentage of educators reported they used or would use the accompanying educational material in their curriculum?

Budgeting for Evaluation
There is no formula for how much evaluation activities should cost. Each project will be different, based on the goals of the assessment. A variable rule of thumb is that evaluation should equal approximately 10 percent of the total budget for the components to be evaluated. This is a good starting place from which evaluation can be scaled up or down. If your budget is fixed or you are working within a set limit, advise the prospective evaluator of the target range for the work before requesting a detailed plan.

Process: Evaluating Your Efforts

Finding an Evaluator

Evaluation can be done by in-house staff or by a third-party evaluator. Either way, the staff involved must be knowledgeable about and experienced with the components of an evaluation. A benefit of using internal staff for project evaluation is that they may have working knowledge of the content and be more accessible for spur-of-the-moment meetings, and some of the cost may be covered by your organization's operating budget.

Third-party evaluation may be more complicated to establish and monitor, but the results typically bear more weight, since the evaluator is considered an impartial professional with no vested interest in the outcome of the research. In addition, many funders, including government sources, require professional, third-party evaluation.

To find potential evaluators, ask colleagues who they have used. Funders can tell you about evaluators who have worked on projects they have funded. If you are targeting a specific funder for the lion's share of your budget, you may want to ask your project officers' advice, because they may have specific evaluators they do — and don't — respect. You can also contact the National Center for Outreach (NCO) for recommendations and assistance, or check the Outreach Pipeline on the NCO Web site. Look for similar projects, and call the appropriate contact person to find out who is evaluating the project. If your educational outreach materials are tied to national or state standards, you might want your material evaluated by an individual with experience and credibility in those curriculum areas.

Typically, you will want to identify and engage an evaluator as you begin the project-planning process so that your project timetable can appropriately accommodate the time needed for different evaluation phases. You should also include the evaluation plan as part of the proposal you send to funders.

Evaluating an Evaluator
When selecting an evaluator, consider the following about the individual or company:
• Experience in evaluation and ability to grasp your project quickly
• Knowledge base and strategies for gaining more information about your organization and project
• Attitudes regarding evaluation that suggest a compatibility with your project, evaluation goals, and organizational dynamics
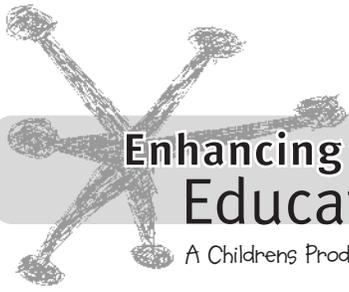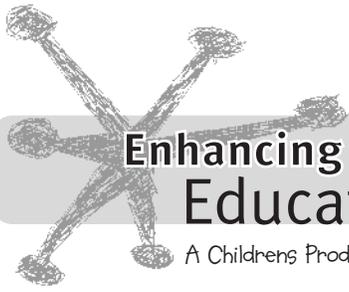
Process: *Evaluating Your Efforts*

Finding an Evaluator (cont'd)

During the initial meeting or conversation, ask your prospective evaluator questions such as the following:

- **What is your general experience in evaluation? Has your organization been in business for some time? Do you specialize in one type of evaluation, or a broad range?**
  Some groups prefer to undertake either formative or summative evaluation, but not both.
- **What is your general experience with activities like ours? With participants like ours?**
  Look for organizations that are familiar with educational outreach in general, and specifically with the type of project you are planning.
- **What is your experience with our target audience(s)?**
  Remember, the audience for the outreach may be wider than for your broadcast program.
- **We want to know X about our program. Have you evaluated this type of question before for other projects?**
  If your main goal is to determine how users navigate your Web site to learn about a particular topic, then you will want to find an evaluator who has experience and facility with the Web medium.
- **What evaluation approaches do you think are relevant to our situation? Are the results likely to be more subjective (assessing changes in emotions, beliefs, etc.), objective (offering statistical data), or a combination of the two?**
  Much of this will depend on the types of questions you ask, but you should be aware of the kind of evaluation that will be acceptable to you and what may be required by your funders.
- **What do you consider to be aspects of a strong evaluation? A weak evaluation?**
  How well does the evaluator articulate components that contribute to a successful evaluation effort? Does he talk about tailoring efforts to each project, using a combination of subjective and objective measures, focus groups, large national surveys, and other approaches as appropriate to different situations?
- **What processes and evaluation approaches would you use for this project?**
  Will the evaluator use a cookie-cutter approach for your project or design one specifically tailored to your needs? For example, a mixture of focus groups, mailed surveys, and telephone interviews may or may not be appropriate to your situation. You want an evaluator to think about the particulars of your project.
- **What would you need to know from us to determine appropriate evaluation approaches and methods?**
  An evaluator will typically need to have several conversations with you and other project members and read all relevant background material to fully understand your project, its goals, and what you will consider important evaluation results. You cannot, however, expect an evaluator to tell you what's important to find out about your resources. This is why you

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Process: Evaluating Your Efforts

Finding an Evaluator (cont'd)

need clearly established goals and objectives for your project from the outset.

- **Do you subcontract for any services? If so, can résumés of subcontractors be provided for our information?**
  You want to be sure that the credentials you're buying are the ones you're actually getting.
- **Are you willing to sign a nondisclosure or confidentiality agreement?**
  Do you want the evaluator to share the results of your project with others without your knowledge or approval? If not, you should be clear about this from the beginning.
- **We have a budget of X. What type of plan would you recommend for this range?**
  Is the evaluator creative in working within your budget? Some larger groups may not take on a project unless the evaluation budget is over a certain amount, such as $10,000.
- **How rapidly do you provide feedback, and in what form?**
  This is particularly important for front-end and formative evaluation, since you will want to get timely feedback that can inform the further development of your activities.

Make sure to ask for references from people with whom a potential evaluator has worked on prior occasions. An evaluator is likely to give you names of satisfied customers only. One way to gather more information is to ask for a list of all clients from the previous year and request permission to contact whomever you choose. Another option is to write down the names of organizations that the evaluator references when you meet and ask to talk directly to those clients. If the evaluator uses them as examples, you should be able to speak with them for more information. You may also ask to see samples of an evaluator's reports to assess if they meet the scientific rigor you want and are compatible with the type of audience you expect to reach with the evaluation results and reports.

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Process: Evaluating Your Efforts

Focus Groups

Focus groups can provide you with a range of useful information, from your project's inception through its implementation. They should include representatives of the audiences you have targeted for your educational outreach. If, for example, you are developing a video and companion materials for second-grade students, then second-grade teachers and/or their students should be in the focus group.

At the front end of a project, you can hold focus groups to help refine your educational objectives. You can discover what participants already know about a topic, what material they already have and what they think they need, and how they envision using different types of information and related materials.

As you are producing your materials, focus groups can comment on the design and clarity of your rough videos, print materials, or Web sites, evaluating their usability for the intended audience and suggesting revisions. The data you gather can also suggest strategies for distributing the materials to your audience.

Focus Group Procedure
Use the following steps to plan, run, and assess a focus group:

- **Identify purpose and audience**
  What do you want to know? Who are you trying to reach? Include a mix of both "first adopters" and those who are typically slow to adopt innovations. You can determine these types when you screen potential participants.

- **Develop screener document (See Sample Teacher Screener (PDF).)**
  This document is designed to help you select a well-rounded group that is consistent with the audience for the project. The screener is a questionnaire that shouldn't take more than five minutes to administer to each potential participant.

- **Recruit participants (See Sample Recruitment Checklist.)**
  Allow two to three weeks to recruit. Using the screener, choose participants who demonstrate diversity in the following areas: race, gender, age, length of teaching experience (if relevant), and geography (e.g., rural, urban, suburban).
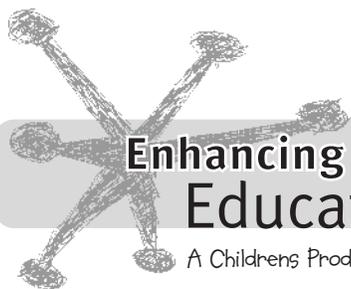
Process: Evaluating Your Efforts

Focus Groups (cont'd)

- **Sign up and confirm participants (See Sample Confirmation Letter.)**
  Once a participant is signed up, send a confirmation letter. (The ideal group includes eight to 12 participants with diverse backgrounds.)

- **Develop discussion guide (See Sample Discussion Guide Outline.)**
  Begin with general questions; then move to more specific probes. For example, you might ask participants: "What aspect of mathematics is hard to teach? Why? What would help you?" Then ask: "Where do students have the most difficulty when you teach multiplication? What resources do you wish you had that would help you teach this to students?"

- **Plan session logistics**
  The more observers in the room, the less comfortable participants will be. If possible, use a room with a two-way mirror so that others on the team can view the discussions taking place. You can also use a video camera or audio recorder to record the event and play it back later.

  Logistical considerations:
  - A comfortable room
  - A light snack
  - Close proximity to bathrooms
  - Parking
  - Good set of directions
  - Contact person to greet participants with release forms/honoraria
  - Have all viewing materials cued up
  - Burn a CD for Web site testing to avoid technical glitches
  - Table with nametags
  - Assign note taker from your team to take notes
  - Audiotape and/or videotape the session

- **Run focus group**
  Follow the Sample Discussion Guide Outline. Be sure to set ground rules for the group, such as "There is no right or wrong answer; jot down ideas as they come to you; respect other participants' right to speak; stop speaking when the facilitator asks." Answer a question with a question. Allow as many opinions to emerge as possible. STAY ON TIME! It is important to plan out your time and control the discussion in order to complete the entire agenda you have laid out. If there isn't enough time to ask all of your questions, send a follow-up e-mail, although this is less desirable.

Process: Evaluating Your Efforts

Focus Groups (cont'd)

- **Debrief informally**
  Immediately after the session, ask the note taker to read the notes aloud. The facilitator and other project participants and observers should discuss the following: "What did we learn? What in our planning was confirmed? What did we find surprising? What seems to be our next step?"

- **Analyze notes (and/or tapes)**
  Within three days of the focus group, type up and then analyze the notes. Look for suggestions for improving your product. For example, you may find that when you showed a clip from a video, the focus-group participants seemed confused about the concept. They suggested that a narrative voiceover or a graphic might be helpful. They also suggested that you delete several seconds of discussion that they found extraneous. You may find that participants responded quite favorably to particular aspects of the product. You can list these positive responses to incorporate into promotional material.

- **Write focus group report**
  Summarize the following:
  - Recruitment process
  - Participant profiles
  - Information gathered
  - Impact on the original thinking
  - Changes that will be made