



Enhancing Education

A Producer's Guide

➤ The Educational Outreach Development Process

As you begin working on your production proposal and are articulating your film'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). The basic development process looks like this:

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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 literacy skills or to increase awareness of the importance of technology in our economy.

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 that examines high-speed roller coasters, you can state that "middle school students will learn the math skills needed to determine the rate of a moving object." 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.

It is important to note that the general audience for a program may be very different from the target audience for your educational outreach, and the way in which these two audiences use the program can vary significantly. For example, the general viewer watching the *NOVA* program "Galileo's Battle for the Heavens" will have a different purpose from the high school science student who is looking at challenges of scientific discovery; or from the high school Western history student who is examining the power of the church; or from the principal who is trying to get teachers to think differently. Since the general audience and the target audience for your educational outreach may vary, the goals for overall series and for your educational outreach may vary as well.

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.



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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 organizations are an obvious place to start if you're targeting teachers.

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 middle school-aged 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 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. For example, visit their Web site(s) and 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 they 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?

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



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Collaborating with Partners (cont'd)

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.

One extreme example: WGBH's *Between the Lions* brought partners together two years before production started. While it was difficult to sustain interest when the production greenlight kept being delayed, *BTL* got incredible buy-in. These partners went above and beyond. They felt true ownership in the project and initiated their own activities related to it.

Clarify Expectations

Make sure you both understand the goals of your partnership and what each of you is going to do and provide. Clarify their level of involvement up front and the extent to which they expect editorial input or control.

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.



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➤ *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, 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% of stations have departments exclusively dedicated to outreach services
- 35% are located in Education departments
- 26% are located in Promotion/Communications departments

So when working with a station, it is important to identify which department can provide you the assistance you need.

In the fall of 2000, the Independent Television Service (ITVS; <http://www.itvs.org>) 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 (http://www.beyondthebox.org/buzzwords/BZSF01_5.html) 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!



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Working with Public Television Stations (cont'd)

You can reach stations either through your presenting station or through the NCO's mailing list of station outreach staff. 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
- 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 educational outreach staff asking them to propose what they will do. The size of the stipend will depend on your budget. As more and more projects offer stations stipends (generally ranging from \$1,000 to \$15,000, with most in the \$2,000-5,000 range), you will be entering a somewhat competitive environment. The more you can offer, the more appealing your project may be.



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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 Science Teachers Association, National Council of Teachers of English, International Reading Association, National Council for the Social Studies, and National Middle School Association. 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 (<http://www.edweek.org/context/orgs>) with links to their home pages.



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Working With Parents

Families are often the end users of educational outreach materials and resources. 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. 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 impact 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 use parents as a conduit for providing resources to their children. 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 parents is such a broad audience 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.



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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 looks. 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. In addition, 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 backgrounds and experiences with them.

Some things to consider: Are you trying to reach parents with children in a particular age group? What is the socio-economic 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 afterschool programs are good places to reach parents of younger children. Educational organizations can help you reach teachers, and a range of afterschool programs are part of 21st Century Community Learning Centers, Boys and Girls Clubs, and YMCAs and YWCAs. High school kids are involved in programs that are more thematic, so you will have to think thematically. Should you go through student government, sports teams, band programs? What national associations serve these audiences? Another approach is through informal education organizations where parents tend to volunteer, such as Girls or Boys Scouts, 4-H Councils, museums, libraries, and sports teams. Homeschoolers can also be an important audience for your resources. There are several national educational organizations that work with homeschoolers, including the Home School Legal Defense Association, National Home Education Network, and National Home Education Research Institute. Finally, don't forget local PBS stations. They know where to find parents, and work with them regularly.

Evaluation

Evaluation is important for every educational outreach project, and your funding may depend on having a well-defined plan. Treat evaluation as an integral part of your development process rather than an afterthought. Because parents can be challenging to reach and communicate with, it is important to plan your evaluation carefully. Ideally, you will want to work with an independent evaluator who has experience working with parents. Whether you hire someone or



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Process: Collaborating with Partners

Working With Parents (cont'd)

plan to conduct the evaluation yourself, think about what is required to evaluate your defined goals. Do you need to conduct pre- and post-tests to measure attitudinal and knowledge changes? How will you ensure ongoing contact with a specific group of parents? How will you collect contact information and reach parents to do follow up?

Again, partnering with an organization that serves parents can help you maintain a long-term relationship with parents. When designing a project targeting parents, if you cannot define an achievable evaluation plan, you may want to reconsider your project goals and even the target audience.



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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. The process described here applies to any media you may decide to produce.

Begin this process by doing some research about the content needs of your audience. 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 you might look at those, if you can identify localities that matter to your project. 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.
- 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 some popular textbooks.
- 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 content ideas by them and ask them to prioritize them. See if friends in other states can connect you with teachers in their area you can talk to on the phone or via 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 in how your subject is handled. Some of these trends are described in the Teaching & Learning Strategies section of this guide.
- If you are targeting an informal education audience, hold a focus group of after-school providers, librarians, 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, and greater support on your part.



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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, YMCA/YWCA, or Boy/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 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 an important piece of 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.” Their names can help open doors for you, but often they 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 you know can give you the time you need to give real, constructive feedback.

The best projects have advisory boards that span all the pieces, from planning 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, very 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 them to spend? 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 hearing 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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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 it 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 and 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 after-school programs or libraries. You need to know your market and think critically about why you are choosing one media over another. Whatever decision you make is fine, as long as you can justify it to yourself and your funders!

➤ *Process: Choosing Appropriate Media*

Case Study: Evolution and Poetic License

The *Evolution* project used Web, video, print, and face-to-face training to accomplish its central goal: improving the teaching of evolution. This goal was accomplished by the following educational outreach efforts:

- An online professional development course
- Videos of teachers in the classroom teaching evolution
- A teacher's guide that modeled how to use the different *Evolution* resources in the classroom
- Training lead teachers to hold teacher-training workshops around the country

Because the educational outreach components were so integrated, they were very complementary. The online professional development course, for instance, benefited greatly from including clips from the teacher videos of teachers teaching evolution; it also gave teachers access to classroom resources, such as the online student lessons, student videos, and teacher's guide. While *Evolution* would be difficult to replicate, as it was an unusually well-funded project, it serves as a useful illustration of choosing appropriate media for educational outreach.

Poetic License, on the other hand, was a medium-sized project that chose a combination of mini-grants, teacher's and viewer's guides, a curriculum packet, and a Web site to excite youth about writing.

These tightly targeted educational outreach media enabled the project to support both teachers and youth-serving groups and organizations in working with youths. In particular, mini-grants helped local stations reach out to their communities to develop poetry slams, student/teacher workshops, Web projects, and interstitials or studio programming that aired on their stations.



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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 classroom 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. The National Science Foundation requires substantial educational outreach, for example, as do many 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.

How difficult will it be to raise money for your project?

If you believe you will 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



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Budgeting & Scheduling (cont'd)

among foundations), there are two things to keep in mind. 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 fundraising 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, although 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 into 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 (be they educational print materials, a Web site, an online professional development course, etc.) happens on parallel production timelines three to 12 months before the series or program premiere. One exception is often classroom videos, the production of which may overlap with the broadcast premiere, depending on when the classroom video producers can get access to series footage (or, if it's the same production team, when they can find time to work on the classroom videos). Similarly, 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.



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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 these materials at home.

For all new productions you do, make sure you've gotten clearances 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, learning objects, and datacasting are all 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?



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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 IP visitors. 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:

1. To generate information to help improve the effectiveness of your activities
2. 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.



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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 of 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 knowledge tests, students will demonstrate a significant increase in their understanding of America's role in the Holocaust). Or they can be more subjective (e.g., the resources will encourage educators to teach about jazz and use the PBS program as part of their curriculum). 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 Jazz 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.

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- Sample Teacher Screener
- Sample Recruitment Checklist
- Sample Confirmation Letter
- Sample Discussion Guide Outline

➤ *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, they may 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 (<http://www.nationaloutreach.org>). 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 individual's or company's

- 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 or she 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



Process: Evaluating Your Efforts

Finding an Evaluator (cont'd)

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

- **Do you subcontract for any services? If so, can resumes of subcontractors be provided for our information?**

You want to be sure that the credentials you are 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 XX. 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 evaluations. 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.

➤ *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 middle school students, then middle school 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, 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 High School Science Library Focus Group Teacher Screener, pgs 24-27.)
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, pg 28.)
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); geography (e.g., rural, urban, suburban).

➤ *Process: Evaluating Your Efforts*

Focus Groups (cont'd)

- **Sign up and confirm participants** (See Sample Confirmation Letter, pg 29.)
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, pg 30.)
Begin with general questions; then move to more specific probes. For example, you might ask participants: "What topic in science is hard to teach? Why? What would help you?" Then ask: "What aspects of teaching about the cell are difficult? What resources do you wish you had that would help you teach the cell 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 name tags
 - 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 steps?"

- ***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



Enhancing Education

A Producer's Guide



Process: Evaluating Your Efforts: Focus Groups

Sample Teacher Screener

Date: _____

Name: _____

School: _____

Address: _____

Phone: (day) _____ (eve) _____

Male Female

Best time to call: _____

Have you ever participated in a project run by the Educational Programming Department at (your station/organization)? If yes, please describe your involvement:

{ if there has been any direct involvement, terminate the interview }

We are planning to videotape the focus group. Do you have any objection to being videotaped?

{ if yes, terminate the interview }

Do you know or have you heard of (name of specific people in the video or media)?
If so, how do you know him/her?



Enhancing Education

A Producer's Guide



Process: Evaluating Your Efforts: Focus Groups

Sample Teacher Screener (cont'd)

What grade level(s) do you teach? _____

What subject(s) do you teach? _____

How long have you been a teacher? _____

How long have you taught at your current school? _____

Is the school where you teach (circle one): Public Private Parochial

Would you describe your school as being in an area that's (circle one): Urban Suburban Rural

It is important for our project to get the perspectives of people of different cultures.

Which of the following best describe your ethnic background?

- African American/Black Anglo American/White Asian American
 Hispanic/Latin Native American Other: _____

Age: _____ or range: 20-30 30-40 40-50 50+

Approximately how often do you watch videos at home? _____

Have you ever watched a video as part of a professional development session? If so, how often?

How long are the videos usually? _____

How familiar are you with the practice of inquiry-based, hands-on science teaching?

Have you ever used this inquiry-based method?



Enhancing Education

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Process: Evaluating Your Efforts: Focus Groups

Sample Teacher Screener (cont'd)

How would you describe your teaching practice, if it's different from what we've already discussed?

Is there anything you'd like to add?

What dates and times are you available?

(Date Option 1) _____

(Date Option 2) _____

(Date Option 3) _____

(Date Option 4) _____



Process: Evaluating Your Efforts: Focus Groups

Sample Teacher Screener: Demographic Summary

Name: Charles Ginsberg

School/District: Lane Technical H.S.

Type (public, private, parochial): public

Area (urban, suburban, rural): urban

Grades taught: 9, 12

Subjects taught: Biology

Years experience: 32 years

Gender: Male

Ethnicity: White

Age: 54

Comments: Incredibly structured categories specific to project

Familiar with inquiry? Not a lot

Use inquiry? Pieces, not regularly

Know featured teacher personally? No



Process: Evaluating Your Efforts: Focus Groups

Sample Focus Group Recruitment Checklist

- Call established contact references
- Order school directory for state
- Call/send faxes/e-mails to the following:
 - Individual schools (address to department chair)
 - Superintendents
 - Applicable district/county personnel
- Use this Web site to find additional schools: www.asd.com
- Contact local organizations, museums, colleges, and universities
- Post recruitment letter on appropriate Web-based bulletin boards



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Process: Evaluating Your Efforts: Focus Groups

Sample Confirmation Letter

[Name]

[Address]

[City, State, Zip]

[Date]

Dear [Name],

Thank you for agreeing to participate in our focus group for (date), from (time) p.m. Please arrive around (earlier time) p.m. as we will begin the focus group promptly at (official start time) p.m. Enclosed you will find directions by car and public transportation to (meeting site). I would appreciate if you could confirm by (date of confirmation) if you are able to attend. I can be reached at (phone number) or e-mailed at (e-mail address).

Please complete the attached release form and enclosed W-9 (only if money will be paid for the focus group) and bring them with you to the event. If you have any questions, feel free to contact me.

We look forward to seeing you.

Sincerely,

[Your name]



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Process: Evaluating Your Efforts: Focus Groups

Sample Discussion Guide Outline

- Introduction and orientation (xx minutes)
- General issues (xx minutes)
 - Problems facing public schools
- Issues specific to project (xx minutes)
 - Inquiry-based teaching
- Viewing of and reaction to product (xx minutes)
- Appropriateness of content for the target audience (xx minutes)
- Discussion of product usefulness (xx minutes)
 - Would you use this product?
 - What additional information or materials would you need to use this product?
- Conclusions (xx minutes)
 - Does anyone have any final comments?
 - Is there anything you are walking away with today?
- Thank participants (xx minutes)