Learning For All:
Program Selection, Implementation and Assessment

Regional Special Education Council – London Regional Office
2011 Research Project

Final Report

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EXECUTIVE SUMMARY

In April 2011, Vicki Corcoran of The Hamilton-Wentworth District School Board approached Ann McKerlie, an independent consultant, to coordinate a research project focusing on special education programming. This project was commissioned by The Regional Special Education Council – London Regional Office (RSEC) and entitled Learning For All K-12 Getting From Here to There: Program Selection, Implementation, and Assessment. The purpose of this project was to create a tool and/or framework that will assist educators with measuring the impact of special education interventions and programs. This tool will be used by educators to answer the following:

✓ Is the program/strategy evidence-based?
✓ Was the program/strategy implemented successfully?
✓ How can the outcomes of special education interventions/programs be measured?

In order to address the research questions outlined above, this initial phase of the project was organized into four components. Firstly, a review of the literature was conducted that focused on measuring special education program implementation, outcomes measurement, and quality of evidence. In order to gather information on the special education interventions/programs being used in school boards, school authorities, and provincial schools in the London region, telephone interviews were then conducted with appropriate respondents. At the same time, telephone interviews were conducted with London region researchers specializing in special education in order to gather information on the current research in the field and suggestions for moving forward. All of this information was then compiled to create recommendations for creating tools that can be used by RSEC members to measure special education programming. Throughout this project, the School Board – University Research Exchange (SURE) consulted on all aspects, particularly recommendations for moving forward.

The literature review was narrowed to focus in the field of education in Canada and The United States. This focus was important since much of the literature is focused in the field of health care. As well, meta-analyses were used wherever possible to synthesize information. The London region researchers who participated in the project provided many directions for reviewing the literature as well as useful resources for moving forward.

Feedback was collected from three groups; school board representatives from RSEC, school authority/provincial schools representatives from RSEC, and London region researchers specializing in special education. There are 16 district school boards (plus 1 associate board), 3 school authorities, and a provincial schools representative in RSEC – London region. The associate school board collaborates in London region RSEC even though their board is not formally in the region (see Appendix A for a list of participating boards and organizations). RSEC provided a membership list for contacting. Respondents all worked in the area of special education and were initially contacted by email in order to schedule a telephone interview of no longer than 30 minutes in length (see Appendix B & D). Further correspondence was conducted via email and telephone. Representatives from all 17 school boards, all 3 school
authorities, and the provincial schools participated in the project. Interviews were conducted from May 17, 2011 to September 21, 2011. Respondents were asked to discuss special education programming implementation and its’ impact on students, special education interventions/programs being used, and current understandings of special education programming in their schools (see Appendix C & E).

SURE recommended that the perspectives of researchers working in the field of special education be included in the project. SURE provided the names of 13 researchers in the London region who may agree to participate. Potential respondents were contacted by email in order to schedule a telephone interview of no longer than 30 minutes in length (see Appendix F). Further correspondence was conducted via email and telephone. In total, 6 interviews were conducted from May 25, 2011 to June 7, 2011. Of the 7 respondents who chose not to participate, three indicated they did not have the expertise, two were leaving their positions and did not have time to participate, one was contacted four times with no success, and one did not have active contact information. Respondents were asked to discuss current research in special education programming and advice on things to consider when looking at tools to assess implementation and outcomes of special education programming (see Appendix G).

At the foundation of this review are two Ministry of Education documents: Learning for All K-12 (2009) and Growing Success: Assessment, Evaluation, and Reporting in Ontario Schools (2010). Resounding clearly from these documents is the current focus on improving student learning and reaching all students. As a result, this project’s focus on special education programming is relevant and timely. In examining other literature for this project, there are many clear links to be made to these Ministry documents. In order to frame this discussion, a focus on special education in Canada and the United States was closely adhered to. Measuring special education program implementation, outcome measurement, and quality of evidence were explored. Various themes arose from this literature review. They are listed below, in no particular order:

- Awareness of Terminology (Information Retrieval)
- Implementation Science
- Tested Pilot Studies Exist
- Measurement (including Evidence-Based, Implementation, and Outcome)
- Assistive Technology
- Access
- Support
- Segregated Classrooms vs. Inclusive Classrooms
- Inclusion
- Universal Design for Learning
- Assessment

In discussions with school board representatives (n=17), it is clear that many great things are happening in special education in the London region. These include, but are not limited to, the areas of programming, worthwhile initiatives, assessment, and follow-up approaches. Various themes arose in these discussions:

- Elementary Panel vs. Secondary Panel
- Measurement
- Implementation Measures vs. Outcome Measures

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Lastly, respondents were asked to comment on what components of the toolkit / framework they would like to see from RSEC. Below are their suggestions:

- Visual flow chart with indicators and points to consider
- Flexibility is key
- Needs to address local board and community needs and pressures
- Needs to be targeted – include crucial information
- Reflection component important
- Address changing Ministry demands on special education
- Needs to be comprehensive, thoughtful, multi-layered, focused
- Provide research and technical support to small boards who do not have those resources
- A process of check-ins

In discussions with school authority and provincial schools representatives (n=4), respondents emphasized early on that they cater to a unique group of students – programs tend to be “tailor-made”. Students must satisfy a certain criteria before being accepted into their schools. As such, they are in a unique situation when compared to school boards. Overall, they do certain things well – adaptive technology, realistic IEP goal setting in programming, Smartboard usage. There is some concern, however, about teacher awareness of regular education. Various themes arose in these discussions:

- Segregated Classrooms vs. Inclusive Classrooms
- Measurement
- Implementation Measures vs. Outcome Measures
- Inclusion

Respondents were asked to comment on what tools and / or framework would be most useful for them. They indicated some suggestions for the framework:

- Student progress should be a focus – measuring progress is key
- Need a baseline to start
- Reflection is an important component
- It needs to reach all students, regardless of specialization
- Implementation is key
- Consider special education programming when constructing it – it should be student-focused, family centered, ensure research/development allows students to be successful in community schools
In discussions with London region researchers specializing in special education (n=6), they cautioned that it is important to be aware of one’s own background and experiences when examining special education literature. Overall, special education is based on the premise of individualized education and paying attention to the needs of every student. Respondents provided suggestions for creating tools to assess the implementation and outcome of special education programming. As well, respondents provided advice on how to build a toolkit for use in evaluating components of special education programming – indicating overall that a toolkit was a “good direction to go in”. Various themes arose in these discussions:

- Inclusion
- Segregated Classrooms vs. Inclusive Classrooms
- Support
- Universal Design for Learning
- Excitement for RSEC Framework
- Differentiated Instruction
- Tension
- Information Retrieval
- Technology
- Assessment

In consultation with SURE, this project has yielded several recommendations thus far. It is recommended that the toolkit and /or framework should be a combination of pieces that address the three project areas (evidence-based, implementation, and outcomes). Each component needs to be addressed separately when evaluating programming. For measuring the evidence-base of programming, the U.S. Department of Education provides some clear questioning and points to consider. This and other resources will assist RSEC in creating questioning and a multiple step process that can be used by its’ members (see Appendix H). For measuring implementation of programming, a fidelity measurement is recommended. Usually in the form of an observable checklist, the examples provided will assist RSEC in creating a checklist that can be used by its’ members (see Appendix I). In measuring outcomes, it is important to be clear as to what outcome is the focus. Once that is established, an appropriate measure can be chosen. There are many different ways to collect data on the outcomes of programs / interventions, but this should only occur after steps have been taken to evaluate whether the program / intervention is evidence-based and has been implemented as it was intended (see Appendix J). A proper evaluation of a program / intervention is not complete until all three areas have been explored.
1. BACKGROUND

In April 2011, Vicki Corcoran of The Hamilton-Wentworth District School Board approached Ann McKerlie, an independent consultant, to coordinate a research project focusing on special education programming. This project was commissioned by The Regional Special Education Council – London Regional Office (RSEC) and entitled *Learning For All K-12 Getting From Here to There: Program Selection, Implementation, and Assessment*. The purpose of this project was to create a tool and/or framework that will assist educators with measuring the impact of special education interventions and programs. This tool and/or framework will be used by educators to answer the following about special education interventions and programs:

- ✔ Is the program/strategy evidence-based?
- ✔ Was the program/strategy implemented successfully?
- ✔ How can the outcomes of special education interventions/programs be measured?

In order to thoroughly address the research questions outlined above, this initial phase of the project was organized into the following components:

i. A review of the literature that focuses on measuring special education program implementation, outcome measurement, and quality of evidence.

ii. Gathering information on the special education interventions/programs being used in school boards, school authorities, and in provincial schools in the London region as well as any tools they currently have for measuring the outcomes of these interventions/programs. This information was gathered through telephone interviews with all RSEC members.

iii. Gathering information on current research being conducted in the field of special education as well as suggestions for moving forward with a tool and/or framework that would apply to special education. This information was gathered through telephone interviews with London region researchers specializing in special education.

iv. The above information was used to compile recommendations for the creation of tools that can be used by RSEC members to measure special education programming.

The findings contained within this research report as well as any documents created using these findings will be used by The Regional Special Education Council – London Regional Office (RSEC) to continue into the piloting phase of this project with RSEC members. The Lead Researcher for this project has taken steps to ensure the confidentiality of the information provided by participants. RSEC members will discuss the scope for sharing the final product(s) of this project once it is complete.

2. METHODOLOGY

The purpose of this project is to create a toolkit and/or framework that RSEC members can use to evaluate special education programming within their districts and schools. In order to inform the
creation of this toolkit and/or framework, a review of the literature was conducted in order to focus further discussion on the topic. In order to gather information on current special education programming across the London region, all RSEC members as well as London region researchers specializing in special education were interviewed. RSEC members include the 16 school boards represented in the London region (plus 1 associate board), 3 school authorities, and a provincial schools representative. The associate school board collaborates in London region RSEC even though their board is not formally in the region (see Appendix A for a list of participating boards and organizations). Ethical concerns were explored prior to all fieldwork being conducted. All instruments developed for collecting data are included within this report (see Appendices B-G).

Throughout this project, the School Board – University Research Exchange (SURE) has consulted on all aspects and has been at the forefront in providing recommendations to RSEC for moving forward. SURE is a collaborative initiative designed to link research and practice in the London region of the Ontario Ministry of Education. SURE is made up of representatives from the 16 district school boards and 5 provincially-funded universities with faculties of education in the London region. SURE leadership is shared by a steering committee that includes Deans / Associate Deans of Education and Research Officers within London region district school boards.

There are many tools used throughout Canada and the United States to evaluate special education programming, whether the focus is implementation, outcome-driven, and/or whether the programming is evidence-based. Examples of some of these tools have been included in this report to serve as starting points when RSEC is deciding what they will pilot for use by their members.

The following explains the process for collecting information for this phase of the project:

2.1 Literature Review

At the beginning of this project, a review of the literature was completed. The focus was on literature that addressed measuring special education program implementation, outcome measurement, and quality of evidence. Since this is a very expansive body of literature, it was important to structure the scope of the review. The focus was narrowed to literature from Canada and the United States in the field of education. This clarification was important since much of the literature in this area is focused in the field of health care. As well, meta-analyses were used wherever possible to synthesize information.

The London region researchers who participated in the project provided many directions for reviewing the literature as well as useful resources for moving forward.

2.2 Scan of the Practice Landscape

Feedback was collected from three groups; school board representatives from RSEC, school authority/provincial schools representatives from RSEC, and London region researchers specializing in special education.

RSEC Members & Associate Member – School Board Representatives

There are 16 district school boards (plus 1 associate board) in RSEC – London region. The associate school board collaborates in London region RSEC even though their board is not formally in the region.
RSEC provided a membership list for contacting. Within each district, respondents all worked in the area of special education. Respondents included Superintendents, Assistant Superintendents, Principals, Program Coordinators, Curriculum Coordinators, Systems Coordinators, and Associate Directors of Education. Respondents were initially contacted by email in order to schedule a telephone interview of no longer than 30 minutes in length (see Appendix B). Further correspondence was conducted via email and telephone, preference determined by the respondents. Representatives from all 17 school boards participated in the project. Interviews were conducted from May 17, 2011 to September 14, 2011.

Respondents were asked to discuss current mechanisms used within their districts to measure how well special education programming is being implemented and what impact it has on students. Information was also gathered on the different types of special education interventions/programs being used and current understandings of special education programming in each district. Respondents were asked for feedback on the kinds of tools and/or framework that would suit the needs of their particular district (see Appendix C).

RSEC Members – School Authorities and Provincial Schools

There are 3 school authorities as well as the provincial schools that are members of RSEC – London region. These groups offer specialized programming for specific groups of students. RSEC provided a membership list for contacting Superintendents and Principals at each of the school authorities and provincial schools. Respondents were initially contacted by email in order to schedule a telephone interview of no longer than 30 minutes in length (see Appendix D). Further correspondence was conducted via email and telephone, preference determined by respondents. Representatives from all 3 school authorities and a representative from the provincial schools participated in the project. Interviews were conducted from July 5, 2011 to September 21, 2011.

Respondents were asked to discuss current mechanisms used within their schools to measure how well special education programming is being implemented and what impact it has on students. Information was also gathered on the different types of special education interventions/programs being used and current understandings of special education programming in each of the schools. Respondents were asked for feedback on the kinds of tools and/or framework that would suit the needs of their schools (see Appendix E).

London Region Researchers Specializing in Special Education

Early on in the project, SURE recommended that the perspectives of researchers working in the field of special education be included. To complete this, SURE provided the names of 13 researchers in the London region who may agree to participate. Potential respondents were contacted by email in order to schedule a telephone interview of no longer than 30 minutes in length (see Appendix F). Further correspondence was conducted via email and telephone, preference determined by respondents. In total, 6 interviews were conducted from May 25, 2011 to June 7, 2011. Of the 7 respondents who chose not to participate, three indicated they did not have the expertise, two were leaving their positions and did not
have time to participate, one was contacted four times with no success, and one did not have active contact information.

Respondents were asked to discuss current research in special education programming as well as to provide advice on things to consider when creating tools to assess implementation and outcomes of special education programming (see Appendix G).

3. FINDINGS

This section sums up the information collected in this initial phase of the project.

3.1 Literature Review

At the foundation of this review are two Ministry of Education documents: *Learning for All K-12* (2009) and *Growing Success: Assessment, Evaluation, and Reporting in Ontario Schools* (2010). Resounding clearly from these documents is the current focus on improving student learning and reaching all students. As a result, this project’s focus on special education programming is relevant and timely. In examining other literature for this project, there are many clear links to be made to these Ministry documents. In order to frame this discussion, a focus on special education in Canada and the United States was closely adhered to. Measuring special education program implementation, outcome measurement, and quality of evidence were explored. Various themes arose from this literature review. They are listed below, in no particular order:

**Awareness of Terminology (Information Retrieval):** The literature often cautions that it is imperative to be aware of how commonly used terminology is defined in special education. For example, terms such as inclusion, outcome, and implementation are used often. However, many times it is taken for granted that these terms have one established definition. This is not always the case, and these terms are often used quite differently (The Compassion Capital Fund 2008; Michie, Fixsen, Grimshaw, and Eccles 2009).

**Implementation Science:** Implementation Science is the introducing of policy that encourages and later requires the scientific reporting of complex behaviour change interventions. It is often the case that intervention evaluations are not described in terms of content or delivery. As a result, there are very little details of the intervention. This situation prevents replication (Michie, Fixsen, Grimshaw, and Eccles 2009). There is often a gap between science and practice, but this gap is slowly closing with more evidence-based practice being documented (Wandersman et al. 2008; Fagan et al. 2008).

**Tested Pilot Studies Exist:** Many pilot studies have been conducted in education (e.g. Manitoba Speech-Language Pathology Outcomes Measure) that include comprehensive program measurement tools and / or frameworks that have been rigorously tested (Manitoba Education, Training and Youth 2000). These can be used as resources going forward and as starting points for creating tools and / or frameworks to be used by RSEC members.
**Measurement:** When implementing measurement tools, it must be clear as to what the tool is measuring (e.g. effectiveness, sustainability, satisfaction). It is also important to have a combination of qualitative and quantitative research methods. There are three established ways to measure special education programming - looking at their basis in evidence, implementation, and outcomes. A combination of these measures is often the preferred approach. For example, it is clear that implementation has a direct influence on program outcomes. Including a measure of implementation and a measure of outcomes in any program evaluation is absolutely necessary to the success of the program and the students involved (Durlak and DuPre 2008). Each of these measures is discussed in the literature:

*Evidence-Based Measurement:* The move to evidence-based practice is continuing to grow in the field of education. It has even become a requirement for many funding opportunities as well as necessary for practice to be used to influence policy and change (Wandersman et al. 2008; Gorman-Smith 2006). There are many guides and tools that help practitioners determine whether their programs are evidence-based (for example, see U.S. Department of Education Institute of Education Sciences National Center for Education Evaluation and Regional Assistance). There are exemplars in the literature that illustrate special education programming that is evidence-based. For example, Scruggs et al. (2009) present a meta-analysis that includes key questions and recommendations to ensure that worthwhile special education interventions that will improve secondary student learning are addressed.

*Implementation Measurement:* Implementation measurement is essential to any program evaluation because if a program is not implemented properly, it will not accomplish what it was created to do (Gorman-Smith 2006). The implementation process is affected by many components related to community, providers, delivery, and support (i.e. training). More information is needed on how these factors influence implementation (Durlak and DuPre 2008; Wandersman et al. 2008).

Implementation fidelity determines how well the program is being implemented when compared to the original program design, and it is important in achieving successful outcomes. The closer an intervention adheres to the original design, the greater the degree of behaviour change. As well, adherence to a program can be increased by having an outside person monitor implementation (e.g. a teacher who does not work directly with the program). Although not a new concept, ways to measure fidelity are fairly recent (Mihalic 2002). A lack of implementation fidelity is an indicator of a gap existing between science and practice, which will then lessen the chances of successful program outcomes. Designers, implementers, and sponsors of programs all share responsibility for implementation quality, and everyone needs to work together in this (Fagan et al. 2008). A common and user-friendly way to measure implementation fidelity is by way of a checklist (Botvin LifeSkills Training; OrRTI – Oregon Response to Intervention; also see examples of checklists in Appendix I).

*Outcome Measurement:* Outcome measurement is an approach that explores the impacts or results of a program on the people involved, and it is often driven by the need for accountability. Three
main questions are addressed – what has changed in the lives of the students as a result of this program?; has this program made a difference?; and, how are the lives of the students better as a result of the program? In order to develop a plan for outcome measurement, the following are necessary: defining realistic program outcomes, creating a logic model that identifies the resources / activities needed to accomplish the outcomes, identifying specific measures, and designing a plan for collecting data on these measures (The Compassion Capital Fund 2008; Killion 2008)

The Compassion Capital Fund’s Intermediary Development Series on Measuring Outcomes (2008) lays out six steps for developing an outcome measurement system:

1. Prepare for outcome measurement work by considering staffing and participation needed, a timeline for implementation, and resources available
2. Identify outcomes that are meaningful, relevant, and realistic for the program
3. Create a logic model that lays out all elements of the program and demonstrates the theoretical basis of the program
4. Identify specific indicators that can be used to measure the success of achieving intended outcomes
5. Select data collection methods appropriate for the program and create valid / reliable data collection instruments
6. Design a plan for carrying out data collection

Assistive Technology: Assistive technology often plays a large role in the learning of students with special needs. Unfortunately, few measures exist that indicate the effectiveness of certain assistive technologies. Over the last ten years, these discussions have begun and the literature is continuing to grow. For example, see Silverman et al. 2000.

Access: Special education requires many resources, and these resources are not always allocated evenly across schools. In comparing special education services and school demographics, a study by People for Education reported some grim inequalities. They reported that the average number of children on special education waiting lists in low-income neighbourhood schools is twice as long as those in more wealthy schools. As well, the help that is available to students in low-income schools is more likely to be inadequate when compared to help in more affluent schools (Rushowy 2011). We take for granted that all students with special needs have access to the help they need. Spaulding (2009) explains that the critical issue in special education today is not access, but instead, effectiveness. Determining which programs / interventions are most effective for ensuring student achievement is fundamental, especially in a time when accountability is considered to be so important.

Support: There is an extensive body of literature that highlights educators’ concerns that they do not have the necessary skills to respond to the needs of special education students while in their classrooms. This is even found to be the case with educators who have participated in special education training. Educator concerns often include the following – lack of training in special education, lack of contact with someone with special needs, and a lack of confidence teaching students with special needs (Sharma, Forlin, and
The Sentiments, Attitudes and Concerns about Inclusive Education Scale (SACIE) was developed to measure the thoughts and feelings of teachers and pre-service teachers about inclusive education (Loreman, Earle, Sharma, and Forlin 2007). This scale has collected many of the same concerns listed above.

Segregated Classrooms vs. Inclusive Classrooms: There is an extensive body of literature that documents discussions of segregated versus inclusive models of education. One prominent argument against the segregated model of education is that the social aspect of education in a regular classroom is extremely important for all students, regardless of their abilities and needs (Roeser, Midgley, and Urdan 1996; Davis and Watson 2001; Frederickson, Simmonds, Evans, and Soulsby 2007). It is also beneficial for the general health of students to be in an inclusive setting (Timmons). While some versions of the segregated model still exist in Canada and the United States, most of the current literature advocates for inclusion.

Inclusion: In the past, many educational systems followed an integrated model as a segway to inclusive education. The integrated model holds that special education students should be in regular schools / classrooms whenever possible. This approach, however, suggests that students need to fit into the system (Peters 2007). This focus has now changed, and it is an expectation that the system will adapt to meet the needs of the students. This model, inclusive education, advocates that all students participate primarily in regular schools / classrooms, under the guidance of the regular classroom teacher. When necessary, students with special needs may also receive some instruction in an alternate setting, such as a resource room (Sharma, Forlin, and Loreman 2007; Sharma et al. 2011).

Universal Design for Learning: Within education, Universal Design for Learning (UDL) is an approach for curriculum development that holds that all students should have equal opportunities to learn. As a blueprint for creating curriculum that will work for everyone, flexible approaches that can be customized for individual needs are produced. UDL is premised on the idea that all students learn differently (Center for Applied Special Technology).

Assessment: Often times, students with special needs participate in forms of assessment that vary from the regular population. Although they are still required to complete curriculum expectations, certain modifications and/or accommodations can be made and different achievement standards may become the basis for assessment. Since the learning experiences of students with special needs may be based on different expectations, it is difficult to look at an established curriculum. Methods to overcome this difficulty have recently started to be developed, and they will help with alignment to alternate assessments, professional development, etc. (Karvonen et al. 2007).

3.2 Scan of the Practice Landscape

In scanning the practice landscape, interviews were conducted with RSEC member school board representatives (plus one associate member), RSEC member school authority / provincial schools representatives, and London region researchers working in the field of special education.
3.2.1 RSEC Members & Associate Member: School Board Representatives (n=17)

It is evident that many great things are happening in the London region districts, including but not limited to the areas of programming, worthwhile initiatives, assessment, and follow-up approaches. Various themes arose in these discussions:

Elementary vs. Secondary Panel: Respondents often indicated that special education programming is more prominent in the elementary than the secondary panel. Respondents indicated, however, that many promising initiatives are being introduced in the secondary panel in the near future.

Measurement: Respondents indicated that there are not enough qualitative and quantitative measurement tools available for the evaluation of special education programming. Many of the respondents expressed the importance of collecting information from all stakeholders in order to gather the appropriate feedback (e.g. classroom teachers, administrators, resource teachers, students, parents, etc.).

Implementation Measures vs. Outcome Measures: It is evident from the interviews that more is being done across the districts in terms of outcome measurement than implementation measurement. Many respondents indicated that their boards do not do much implementation measurement. Some of the reasons provided for this - no available measurement tools, no data available, and the “right data” being unavailable. Respondents did provide some examples of tools that are currently being used - surveys, pre- and post testing, observations, reports from school professionals, feedback from stakeholders, school visits, needs assessments, IEP intervention, and program reviews. In terms of measuring outcomes, some respondents indicated that multiple measures are necessary.

Impact of Programming: Many respondents indicated that it was tough for them to measure the impact of programming on student achievement. Some measures that have been used in the past, however, include attitudinal data, formal data for individual schools, school visits, student achievement data, feedback, and surveys.

Awareness and Knowledge: Many respondents indicated that it is important to increase awareness and knowledge of special education, even within the realm of special education. This is especially needed in the area of mental health. It is important to avoid looking at special education as a silo – “what is good for one is normally good for others”.

Segregated Classrooms vs. Inclusive Classrooms: While all respondents discussed the importance of integrating special education students into regular classrooms, many districts have self-contained classrooms as well. Some respondents discussed a continuum of services because “not one size fits all”.

Relationships: Many of the respondents were adamant that the key to any success is
relationships. Respondents discussed the importance of relationships amongst teachers, students, parents, other board personnel, and community partners. Building and sustaining these relationships are key.

**Professional Development:** An overwhelming number of respondents suggested that professional development at the school level is very helpful, and it should continue. School-level professional development was described as “more relevant ... and useful” than board-level professional development.

**Excitement for RSEC Framework:** Respondents were very supportive of the framework that will be introduced by RSEC. Many respondents felt there was a real need in their boards, and that a framework such as this would be useful.

Lastly, respondents were asked to comment on what components of the toolkit / framework they would like to see from RSEC. Below are their suggestions:

- Visual flow chart with indicators and points to consider
- Flexibility is key
- Needs to address local board and community needs and pressures
- Needs to be targeted – include crucial information
- Reflection component important
- Address changing Ministry demands on special education
- Needs to be comprehensive, thoughtful, multi-layered, focused
- Provide research and technical support to small boards who do not have those resources
- A process of check-ins

### 3.2.2 RSEC Members: School Authorities & Provincial Schools (n=4)

Respondents framed their discussions by first indicating that all of their students are in special education. Students must satisfy a certain criteria before being accepted into their schools. As such, they are in a unique situation when compared to school boards. Overall, they do certain things well – adaptive technology, realistic IEP goal setting in programming, Smartboard usage. There is some concern, however, about teacher awareness of regular education. Various themes arose in these discussions:

*Segregated Classrooms vs. Inclusive Classrooms:* Programs tend to be “tailor-made” because all students are considered unique. Respondents explained the transition process back to the community school as being very successful overall. All respondents agreed that the “segregated setting [is] not for life”.

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Measurement: Respondents explained that it is often a challenge to measure the students in their schools because they have such a specific group of students. They use both qualitative and quantitative data, and this combination is considered to be very important.

Implementation Measures vs. Outcome Measures: In order to gauge the successful implementation of special education interventions / programs, respondents indicated that they have used pre- and post testing, teacher observations (both academic and social), various formal assessments, and progression in IEP goals. Overall, respondents considered this data to be “informative”. In terms of outcomes, a couple of the respondents indicated that impact is easy to see because of small populations. As such, respondents look at the acquisition of reading and writing skills, feedback from parents, students, and teachers, anecdotal observations, and achievement data (e.g. percentage of IEP goals achieved). They also use school improvement plans and school effectiveness frameworks to focus their attention. If progress is not evident, respondents “stop and take [a] different approach”.

Measurement Tools Needed: There was a general acknowledgement from respondents that they lack a formal mechanism for measuring the implementation of programs in their schools and the impact they have on student achievement. Respondents all indicated it would be very helpful to their practice if they had such tools. One respondent provided the following example. Smartboard technology is now being used in many schools, but there is currently no measure being used to see if it makes a difference in student learning. They do not have any data to show either way but they “think” it makes a difference.

Excitement for RSEC Framework: Respondents were excited about the framework that will be introduced by RSEC. Some respondents spoke about current programs that they hope to use the framework to evaluate.

Small Size: Considering the small size of their schools, respondents indicated that they know “quickly and easily” when a program is ineffective. This provides them with a prompt to change programming if it is not relevant to student achievement.

Inclusion: Respondents discussed the importance of inclusion in research and practice. All of their students are unique, so it is very important to ensure that all aspects of student learning are conducted within the frame of inclusion.

Respondents were asked to comment on what tools and / or framework would be most useful for them. They indicated some suggestions for the framework:

- Student progress should be a focus – measuring progress is key
- Need a baseline to start
- Reflection is an important component
- It needs to reach all students, regardless of specialization
- Implementation is key
• Consider special education programming when constructing it – it should be student-focused, family centered, ensure that research and development allows students to be successful in community schools

3.2.3 London Region Researchers Specializing in Special Education (n=6)

Respondent backgrounds include the following: psychologist, classroom teacher, faculty, resource teacher, principal, faculty of education member, and researcher in special education. Many respondents cautioned that it is important to be aware of one’s own background and experiences when examining special education literature.

Respondents were asked to comment on the current research in special education programming. Overall, many said that special education has not changed over the years. It is still based on the premise of individualized education and paying attention to the needs of all children. Various themes arose in these discussions:

*Inclusion:* Many of the respondents indicated that inclusion is a good way to frame special education. Some respondents advocated that all students should be in the regular classroom. In order to do this, they indicated that every teacher needs a strong background in all exceptionalities. It is important to note that definitions of inclusion vary – people have overriding orientations and overarching fundamental ideas that play a role in these definitions.

*Segregated Classrooms vs. Inclusive Classrooms:* Some provinces have become fully inclusive in education. For example, New Brunswick’s Ministry of Education holds that there is no need to segregate children. One respondent explained that there is a current shift in thinking from “fixing kids” to “fixing environments”. Another respondent asked; what can educators do to change the types of environments so that they will enhance learning for all students? The area of mental health is the only area where respondents considered segregation for short-terms only – segregation should be “duration specific and intervention focused”. A respondent explained that being in an academic setting is most important for all students. The “social difference is huge” for special education students.

*Support:* Many respondents believed that teachers consider special education to be a good thing, but they need support because they are often uneasy having special needs students in their classes. One respondent believed that with this support, teachers would feel more comfortable. Respondents described approaches such as differentiated instruction, inclusion, and Universal Design for Learning as providing teachers with this support.

*Universal Design for Learning:* Respondents explained that many things can be done in the classroom to ensure that everyone feels welcome. It reinforces the notion that special education is not so different. One respondent described it as “really good teaching in a different way”. Two respondents indicated that good teacher has been using UDL since before it was introduced.
**Differentiated Instruction:** One respondent described it as a “fancy term” for figuring out what student’s needs are and addressing them. Respondents unanimously believed that educators are doing well at defining and implementing accommodations - it is “good teaching” to use a variety of instructional tools. Another respondent indicated that everyone is talking about it, but the classroom teacher is still “frustrated [and] very overwhelmed by potentials for differentiation”.

**Tension:** Respondents explained that there is always a new buzz word in education – universal design, backward design, differentiated instruction – but they are concerned that there is a lot of “lip service” but not a lot of changing practice.

**Information Retrieval:** There is a different language being used everywhere because people use different terms to mean the same thing. Work is currently being done to pull all of these terms together. Although not unique to education, one respondent explained that there is a research to practice gap evident. They indicated that two questions are key – can educators find the research in the first place, and, do we know what the evidence base is for programs?

**Technology:** Many respondents described technology and adaptive technology as a big focus currently, but believed that there is no consistent framework in special education. One respondent explained that there have been some effective pilot projects, but it is very “scattered”, and there is not much direction in terms of measurement. Some respondents indicated that more needs to be done to help teachers and parents feel comfortable with technology.

**Assessment:** Some respondents questioned whether changes are really being made in assessment practice. Respondents indicated that although some teachers are making these changes, there is concern that the vast majority of teacher practice has not changed. It is believed by this group of respondents that these changes are critical for special education students.

**Excitement for RSEC Framework:** Although creating a framework such as this is “overwhelming”, most respondents thought it was a “fantastic focus”. They suggested that it is important to harmonize the roles of all professionals working in the schools. As well, one respondent suggested a version of EQAO for special education students as perhaps a helpful tool.

Respondents were also asked to provide advice when looking at tools for assessing the outcomes of special education programming. Respondents were unanimous that the process required some “tweaking” for moving forward. The following are their suggestions, in no particular order:

- Best indicator is progress in IEP objectives
- Individualized approach necessary
- Look at the broader picture (e.g. teacher time, support, professional development, classroom support)
- Look at how students are learning, but also how they feel. The social is as important as the academic.
- Special education is not necessarily different than regular education. It is okay to use EQAO.
• Instruments need to have reliability and validity
• How do we get into the “grit”?
• Many tools need to be available
• It is inappropriate to look for a recipe for special education – this is impossible because all children are unique

Respondents were asked to provide advice on how to build a toolkit for use in evaluating components of special education programming. Overall, respondents liked the idea of the toolkit – “good direction to go in”. The following are their suggestions:

• Ask: What are the tools being used and who needs the toolkit the most?
• Ask: What does the literature say about the effectiveness of the tools?
• Ask RSEC: What are you using as tools in your school board?
• Ask: Who is supporting the use of the tool and is everyone equally well-versed in it?
• Pull together different types of tools and bring together people with different expertise to examine and pilot
• Create an advisory group to make changes, etc. after the pilot is complete
• Language is key – it must be understood by everyone
• Connections made with IEPs
• Parents need to be involved: provided with clear information and support
• Partnering with community groups important because everyone is working for the same purpose. “Why not collaborate?”
• A mix of a toolkit and framework is ideal

It is important to note that one respondent was insulted that a toolkit was being made exclusive for special education. They explained that the population of special education students has as much variation as the population of regular students. They suggested an alternate approach may be to look at the fundamental practical understandings that are good for all students.

4. RECOMMENDATIONS

It is the purpose of this project to ensure that RSEC provides its members with a tool and/or framework that can be used to measure the special education interventions/programs that are currently being used in the London region. In consultation with SURE, this initial phase of the project have yielded several recommendations for moving forward into the piloting phase. Recommendations are provided below to address each of the three components of measuring special education programming that are the focus of this project. In consultation with SURE, it is suggested that the toolkit and /or framework should be a combination of pieces that address the three project areas. Each component needs to be addressed separately when evaluating programming.
4.1 Evidence-Based Measures

It is important that educational practice is supported by strong evidence. The U.S. Department of Education has created a guide to determine whether a program / intervention is evidence-based (see resources list for citation information). This can be used as a starting point in creating criteria for use by RSEC members. A questioning format with multiple steps to work through is most useful in discovering whether or not a program / intervention is evidence-based. Questions should focus largely around methodology.

Including a proper implementation process in any program evaluation is key to ensuring that the effects of the program / intervention are evidence-based.

(See examples of questioning and process in Appendix H)

4.2 Measure Implementation

In order to measure implementation, a fidelity measurement is recommended because it determines how well a program is being implemented in comparison with the original program design. A fidelity measurement is usually an observable checklist. It tests whether the intervention / program was implemented as intended and with consistency. A fidelity measurement can be used multiple times to monitor a program over the course of its development and use.

There are four components examined when looking at program fidelity (Mihalic 2002):

1. Adherence: Is the program being delivered as it was designed? (e.g. with components being delivered to appropriate population, staff training, location, appropriate techniques)
2. Exposure: May include any of the following – number of sessions implemented, length of each session, frequency with which program techniques were implemented
3. Quality of Program Delivery: Looking at the delivery of the program (e.g. skill in using the techniques prescribed by the program, attitude, etc.)
4. Participant Responsiveness: the extent to which participants are engaged by and involved in the activities and content of the program.

Implementation has a direct influence on program outcomes. Including a measure of implementation and a measure of outcomes in any program evaluation is necessary.

(See examples of fidelity checklists in Appendix I)

4.3 Measure Outcomes

It is important to note that measuring outcomes is very complex. When approaching the measurement of outcomes, it is helpful to think in terms of “chunks” – personal, social, learning skills, and academic outcomes. A decision needs to be made about what outcome is the focus of the measurement before a
decision can be made on the appropriate measure to use. There are many different ways to collect data on outcomes.

Outcomes measurement should only occur after steps have been taken to ensure that the program / intervention is evidence-based and that the implementation of the program / intervention has been evaluated (prior to beginning and throughout program use) to ensure that it is working as it was intended.

(See examples of outcome checklists & information on choosing appropriate data collection methods in Appendix J)

5. NEXT STEPS

This report is the culmination of interviews and literature collected on the topic of special education programming. These project components were completed from April 2011 – September 2011. The purpose of this report is to present the current understandings of special education programming evaluation as well as current practices across the London region. It is our hope that this information will start a conversation around creating a framework that can be used to evaluate special education programming.

In phase two of this project, we will be continuing to collaborate with RSEC members in order to finalize a framework that can be used to measure special education programming for its implementation effectiveness, impact on students, and basis in evidence. RSEC members will be encouraged to use this framework in their boards and provide feedback on their experiences. It is our hope that by the end of the 2011-2012 school year, there will be a finalized framework available for use.

6. LIST OF RESOURCES

Provided below are resources that have been used during the initial phase of this project as well as those that will be useful moving forward. The following resources can be used as reference for RSEC as they finalize their toolkit and / or framework for use in special education programming in the London region.


• Dowse, L. (2009). ‘Some people are never going to be able to do that’. Challenges for people with intellectual disability in the 21st century. *Disability & Society, 24*, (5), 571-584. DOI: 10.1080/09687590903010933


• Standards of Evidence as outlined by the Society for Prevention Research, http://www.preventionresearch.org/StandardsofEvidencebook.pdf


Appendix A:

List of Participating School Boards, School Authorities, Provincial Schools & Associate Board

School Boards
Avon Maitland District School Board
Brant Haldimand Norfolk Catholic District School Board
District School Board of Niagara
Grand Erie District School Board
Greater Essex County District School Board
Hamilton Wentworth Catholic District School Board
Hamilton Wentworth District School Board
Huron Perth Catholic District School Board
Lambton Kent District School Board
London District Catholic School Board
Niagara Catholic District School Board
St. Clair Catholic District School Board
Thames Valley District School Board
Waterloo Catholic District School Board
Waterloo Region District School Board
Windsor Essex Catholic District School Board

School Authorities
John McGivney Children's Centre
The KidsAbility Education Authority
Niagara Peninsula Children's Centre

Provincial Schools
London Region

Associate Board
Bluewater District School Board
Appendix B:
Letter for Interview: RSEC Members & Associate Member- School Board Representatives
Dear [Name],

Re: phone interview with you

My name is Ann McKerlie. I am the Project Coordinator for the special project initiated by RSEC on measuring the impact of Special Education interventions and programs. The project consists of three components: a literature review, a scan of the practice landscape to see how/if Boards are currently doing this, and a report with recommendations for moving forward. Ultimately, the goal of RSEC is to develop a toolkit or framework that member Boards can employ to measure the impact of their Special Education interventions and programs.

At the January 28, 2011 meeting of RSEC, Vicki Corcoran provided an update on this project and indicated that the study was moving forward. We are now at the stage in the project where we need to gather information from you specific to your district. To that end, and given your busy schedules, I would like to schedule a time to speak with you or your designate over the phone in order to answer the following questions:

1. How do you currently know how well the initiatives, interventions, and programs in your department are being implemented?
2. How do you currently know what impact your department’s initiatives, interventions, and programs has had on students?

This should take less than ½ hour of your time and will allow us to continue moving forward with this project to support the work of Boards in this region. In order to keep this project on target, I will need to finish this phase of the research by May 25th. I will call you or your assistant in the next couple of days and hopefully schedule a time for our brief telephone conversation.

Should you have any questions and/or comments at any time, please feel free to contact me by telephone (519-204-4529) or email (ann.mckerlie@gmail.com). Vicki Corcoran, Superintendent of Leadership and Learning, HWDSB is the RSEC representative for this project. Please also feel free to contact her should you have any questions (905-527-5092 x2625; vicki.corcoran@hwdsb.on.ca).

Thank you in advance for your help with this important work.

Sincerely,

Ann McKerlie, OCT, B.Ed., M.A.
APPENDIX C:
Interview Questions for RSEC Members & Associate Member- School Board Representatives
RSEC Project
Questions for School Board Representatives

Questions provided in advance

How do you currently know how well the initiatives, interventions, and programs in your department are being implemented?

How do you currently know what impact your department’s initiatives, interventions, and programs has had on students?

Probing Questions (where relevant)

The special education interventions/programs being used in your district;

Tools/methods used in your district for measuring the strength of the evidence-base behind special education programs;

Tools/methods used in your district for measuring the implementation of special education programs;

Tools/methods used in your district for measuring the outcomes of special education programs;

Current understandings of special education programming in your district.
Appendix D:

Letter for Interview: RSEC Members – School Authorities & Provincial Schools
Dear [Name],

Re: phone interview with you

My name is Ann McKerlie. I am the Project Coordinator for the special project initiated by RSEC on measuring the impact of Special Education interventions and programs. The project consists of three components: a literature review, a scan of the practice landscape to see how/if groups are currently doing this, and a report with recommendations for moving forward. Ultimately, the goal of RSEC is to develop a toolkit or framework that members can employ to measure the impact of their Special Education interventions and programs.

At the January 28, 2011 meeting of RSEC, Vicki Corcoran provided an update on this project and indicated that the study was moving forward. We are now at the stage in the project where we need to gather information from you specific to your organization. To that end, and given your busy schedules, I would like to schedule a time to speak with you or your designate over the phone in order to answer the following questions:

1. How do you currently know how well the initiatives, interventions, and programs in your organization are being implemented?
2. How do you currently know what impact your organization’s initiatives, interventions, and programs has had on the children involved?

This should take less than ½ hour of your time and will allow us to continue moving forward with this project. I will call you in the next couple of days and hopefully schedule a time for our brief telephone conversation.

Should you have any questions and/or comments at any time, please feel free to contact me by telephone (519-204-4529) or email (ann.mckerlie@gmail.com). Vicki Corcoran, Superintendent of Leadership and Learning, HWDSB is the RSEC representative for this project. Please also feel free to contact her should you have any questions (905-527-5092 x2625; vicki.corcoran@hwdsb.on.ca).

Thank you in advance for your help with this important work.

Sincerely,

Ann McKerlie, OCT, B.Ed., M.A.
APPENDIX E:

Interview Questions for RSEC Members – School Authorities & Provincial Schools
**RSEC Project**
**Questions for School Authorities & Provincial Schools**

**Questions provided in advance**

How do you currently know how well the initiatives, interventions, and programs in your schools are being implemented?

How do you currently know what impact your schools’ initiatives, interventions, and programs has had on the children involved?

**Probing Questions (where relevant)**

The special education interventions/programs being used in your schools;

Tools/methods used in your schools for measuring the strength of the evidence-base behind special education programs;

Tools/methods used in your schools for measuring the implementation of special education programs;

Tools/methods used in your schools for measuring the outcomes of special education programs;

Current understandings of special education programming in your schools.
Appendix F:
Letter for Interview: London Region Researchers Specializing in Special Education
Dear [Name],

Re: phone interview with you before June 7

My name is Ann McKerlie. I am the Project Coordinator for a special project initiated by The Regional Special Education Council – London Regional Office (RSEC) on measuring the impact of Special Education interventions and programs. RSEC is a collaborative group, represented by members from the School Boards as well as other educational groups in the region. RSEC shares Special Education resources with the goal of improving the quality of service they provide for all students.

The project consists of three components: a literature review, a scan of the practice landscape to see how/if School Boards are currently doing this, and a report with recommendations for moving forward. Ultimately, the goal of RSEC is to develop a toolkit or framework that member School Boards can employ to measure the impact of their Special Education interventions and programs.

We are now at the stage in the project where we are collecting information from researchers working in the field of Special Education. In consultation with the London Region School Board University Research Exchange (SURE), your name was put forward as someone who is knowledgeable on the topic. To that end, and given your busy schedule, I would like to schedule a time to speak with you or your designate over the phone in order to answer the following questions:

1. What is the current research in special education programming?
2. What should we consider when looking at tools for assessing the implementation of special education programming?
3. What should we consider when looking at tools for assessing the outcomes of special education programming?

This should take less than ½ hour of your time and will allow us to continue moving forward with this project to support the work of School Boards in the London region. In order to keep this project on target, I will need to finish this phase of the research by June 7th. I will call you in the next couple of days and hopefully schedule a time for our brief telephone conversation.

Should you have any questions and/or comments at any time, please feel free to contact me by telephone (519-204-4529) or email (ann.mckerlie@gmail.com). Vicki Corcoran, Superintendent of Leadership and Learning, Hamilton-Wentworth District School Board is the RSEC representative for this project. Please also feel free to contact her should you have any questions (905-527-5092 x2625; vicki.corcoran@hwdsb.on.ca).

Thank you in advance for your help with this important work.

Sincerely,

Ann McKerlie, OCT, B.Ed., M.A.
Appendix G:

Interview Questions for London Region Researchers Specializing in Special Education
RSEC Project

Questions for London Region Researchers Specializing in Special Education

Questions provided in advance

What is the current research in special education programming?

What should we consider when looking at tools for assessing the implementation of special education programming?

What should we consider when looking at tools for assessing the outcomes of special education programming?

Would you be interested in being involved in an LOI consultation for funding for the remainder of this project? Will be completed by end of June 2011; looking for researcher input.

Probing Questions (where relevant)

Tools/methods for assessing the evidence-base supporting special education programming;

Tools/methods for assessing the implementation of special education programming;

Tools/methods for assessing the outcomes of special education programming;

Other people you can suggest who may be interested in participating in this discussion.
Appendix H:
Examples of Evidence-Based Measures
Example # 1: Checklist – Is the Program / Intervention Backed by Strong Evidence?

- Randomized and controlled trials that are well-designed and implemented.

  This requires:

  ✓ The program / intervention must be clearly described, including (i) who administered it, who received it, what is the cost; (ii) how the program differed from what others received; (iii) a clear understanding of how the program is supposed to affect outcomes.

  ✓ Be aware of any signs that the random sample may not be random.

  ✓ The data should show that there are no systematic difference between those involved in the program and those who are not prior to the program beginning.

- Collect outcome data

  ✓ Outcome measures must be valid (i.e. accurately measure the true outcomes that the program / intervention is designed to affect)

  ✓ The amount of participant outcome data that has been lost should be small.

  ✓ Collect and report outcome data even for those in the program who do not participate in or complete it.

  ✓ It is preferable to obtain data on long-term outcomes of the program / intervention. This will allow judgement of whether the program’s effects were sustained over a period of time.

- Reporting results

  ✓ If the program / intervention is effective, the size of the effect and statistical evidence is necessary.

  ✓ Be cautious in indicating that subgroups are different than the overall population.

  ✓ All outcomes should be reported, not only the ones where the program / intervention had a positive effect.

  (Synthesis derived from U.S. Department of Education Information)
Example # 2: Questions to Determine Whether Programs / Interventions are Evidence-Based

- How will we know whether the program / intervention has worked?
- Terminology Used – does it make sense? Do we know what it means?
- How will the program / intervention be measured?
- Can the program / intervention be measured by anyone (objectively)?
- Is there a risk of bias?

(Questions derived from: http://raisingchildren.net.au/articles/autism_spectrum_disorder_choosing_interventions.html#choosing)
Example # 3: Steps to Implement Evidence-Based Programs / Interventions

STEP #1: Select an appropriate evidence-based intervention

✓ Evaluation of the program / intervention shows it has sustained, meaningful effects on the focus outcomes.

✓ The program / intervention has been tested in a population and setting similar to the one you are using it in.

STEP #2: Identify resources that can help with successful implementation: careful implementation of the program / intervention's key components is usually essential to achieving the effects the evidence predicts. Information is needed to do this effectively.

✓ A manual or written description of the content of the program / intervention to be delivered is very important.

✓ If necessary, training resources to help those who will carry out the program / intervention (i.e. training manuals, workshops, discussions, etc.)

✓ If necessary, on-going support (i.e. on-site supervision, booster training sessions, on-going consultation sessions)

STEP #3: Identify appropriate implementation sites (e.g. schools or communities)

✓ A top-level official at the site who will be a capable, strong champion of the program / intervention. They will gain and maintain support, address challenges that arise, and provide ongoing support throughout implementation.

✓ Enthusiasm and support for the program / intervention among other administrators and program delivery staff is key. Buy-in is very important.

✓ The ability to commit the financial and other resources needed for the program / intervention to be successful.

STEP #4: Identify key features of the program / intervention that must be closely adhered to and monitored

✓ Staffing and training

  o How many delivery staff are needed to successfully deliver the program / intervention?
  o What qualifications and / or experience do delivery staff need?
  o How much training will staff need prior to the program / intervention and on an ongoing basis?
  o Who delivers the training, and what qualifications and experience do they need?
  o In what setting is the initial and / or ongoing training delivered?
✓ Program / Intervention Content: it is necessary to have an understanding of the program / intervention’s content, materials needed, and compatibility with existing programs.

✓ Program / Intervention Delivery

  o Location / setting
  o Duration of the program / intervention
  o Length of each session
  o Number of people involved in each session
  o Who is included in the program / intervention

STEP #5: Implement a system to ensure close adherence to these key features

✓ Methods for monitoring implementation of key program / intervention features (i.e. staff, training information, information on supervision and monitoring of program delivery staff)

  o For example, this data can be collected through checklists, direct observation, and / or videotaped observation.

✓ Monitoring adherence to the program / intervention’s content: being delivered fully and as designed

  o For example, this data can be collected through checklists completed by program delivery staff and participants, direct observations, videotaped sessions

✓ Monitoring program / intervention delivery: number of participants who have been involved in the program / intervention; number of sessions delivered, how often, and over what time period; setting where delivered

✓ Methods for correcting deviations from the program / intervention’s key features (if necessary)

  o Appoint program “coaches” at the site to provide ongoing support
  o Establish a Help Desk
  o Provide booster training sessions at different times of the year

(Process Derived from Gorman-Smith’s, How to Successfully Implement Evidence-Based Social Programs)
Appendix I:

Examples of Implementation Measures
**Example: Fidelity Checklist #1**

### Harcourt Fidelity Checklist
**1st and 2nd Grade**

<table>
<thead>
<tr>
<th>Teacher Name</th>
<th>Date</th>
<th>Observer</th>
<th>Observed</th>
</tr>
</thead>
</table>

**Phonemic Awareness/Phonics /High Frequency Words**

1. **Phonemic Awareness**: The teacher introduces word-play activities that draw attention to sounds in spoken language, recited poems, and read-aloud literature. (Grade 1)

2. **Phonemic Awareness**: The teacher designates and shares with the students which phonemic awareness activity they will be addressing each day: phoneme segmentation, isolation, blending substitution, addition, deletion, rhyme recognition, syllable blending, syllable segmentation, syllable deletion or onset and rime blending. (Grade 1)

3. **Phonemic Awareness**: The teacher elongates the consonant or vowel sound to enable children to hear the consonant/vowel sound more easily. (Grade 1)

4. **Phonemic Awareness**: The teacher does all Phonemic Awareness activities orally with the whole class. It is not necessary to write any letter–sound correspondences during phonemic awareness activities. (Grade 1)

5. **Phonics**: The teacher introduces letter-sound correspondences systematically, sequentially, and cumulatively as outlined by Harcourt. (Grades 1 & 2)

6. **Phonics**: The teacher explicitly models the process of blending individual sounds into words. (Grades 1 & 2)

7. **Phonics**: The teacher uses a pocket chart and letter/word cards to model word blending activities. (Grades 1 & 2)

8. **Phonics**: The teacher arranges the classroom so that all students can see the pocket chart and letter/word cards. (Grades 1 & 2)

9. **Phonics**: The teacher has created an efficient way to distribute Word Builders and Word Builder cards to each student. (Grade 1)

10. **Phonics**: The teacher uses the decodable readers and lesson plan format, Phonics Practice Book, and Reading Practice Book to review, practice and apply the weekly phonics skill(s) with small groups of students. (Grades 1 & 2)

11. **Phonics**: The teacher uses the spelling lessons to reinforce weekly phonics skills. (Grades 1 & 2)

12. **High-Frequency Words**: The teacher provides daily practice activities for the high-frequency words of the week. (Grades 1 & 2)

13. **High-Frequency Words**: The teacher maintains a high-frequency word wall that is up-dated weekly and visible for easy reference by all students. (Grade 1 & 2)

**Shared Reading**

<table>
<thead>
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<th>Observed</th>
</tr>
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1. Each student has a copy of the text or can see an enlarged copy of the text.

2. The teacher is providing instruction to the whole class or small groups.

3. The teacher models strategy use in the areas of decoding, fluency, vocabulary acquisition, text structure, and/or comprehending text before, during, and after reading aloud.

4. The teachers read the text aloud to the students as they follow along. There is no round-robin reading. The teacher is the competent voice (reader).

5. The teacher stops frequently during the reading to think-aloud and ask questions.

6. The teacher provides the students opportunities to clarify difficult words, ideas, or illustrations.

7. The teacher provides the students opportunities to ask their own questions about the text.

8. The teacher provides the students opportunities to retell and summarize the text.

9. The teacher provides the students opportunities to predict information that will appear in the text.

10. The teacher provides the students opportunities to make connections to self, other texts, and the world based on the text.

11. The teacher expects the children to locate information and provide proof from the text when expressing opinions or answering questions.

12. The teacher facilitates student-to-student discussion as well as teacher-to-student discussion before, during, and after reading the text.

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Topka Public Schools
2005

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Prepared by Ann McKerlie, Project Coordinator
February 2012
## Harcourt Fidelity Checklist

### 1st and 2nd Grade

#### Guided Reading

1. There is a designated guided reading table in the classroom. **Observed**
2. The teacher is using a guided reading lesson plan and keeps formal and informal reading records of students.
3. The teacher is working with a small group of students with similar reading abilities. Each student has a copy of the reader. The selections used for the lesson are appropriate for this ability level.
4. The teacher engages the students in a pre-reading book talk to build background knowledge and to develop knowledge of book vocabulary.
5. The teacher briefly introduces the story and assists the students in making connections between texts they have read and their own world knowledge. A purpose for reading is established.
6. The students make predictions prior to reading the material.
7. The teacher provides opportunities for the students to apply reading strategies, attend to decoding and word meanings, to read for meaning, and to engage in group conversations about the text.
8. The students are reading the entire text to themselves (softly or silently) while the teacher is observing the reader’s behaviors for evidence of strategy use and/or is taking a running record on one or several students.
9. After reading the text, students are involved in activities which include checking predictions, clarifying unknown words, questioning, and summarizing the text.
10. The students are provided opportunities to reread independently or with a partner to develop fluency.
11. The students who are not participating in the guided reading group are engaged in meaningful learning experiences.
12. There are well-defined rules and areas for large, small and independent group activities. There are no activities that will disrupt guided reading.

#### Vocabulary

1. The teacher provides the students opportunities to employ strategies to determine the meaning of unknown words or phrases using picture clues and context clues from sentences and paragraphs. **Observed**
2. The teacher provides the students opportunities to use new vocabulary words in spoken and written language.
3. The teacher provides the students opportunities to explore relationships among words to fully develop word meanings.
4. The teacher uses student-friendly explanations of word meanings and explains how the word is typically used.
5. The teacher provides the students opportunities to be actively involved in using and thinking about word meanings and creating lots of associations among words. The students are not simply looking up the dictionary definition and using the vocabulary words in a sentence.
6. The students are using synonyms, antonyms, and homophones to determine the meaning of words.

#### Writing/Grammar

1. The students will participate in daily language practice and journal writing. **Observed**
2. The teacher models and the students practice writing a complete sentence and recognizing an incomplete thought.
3. The teacher models the writing process.
4. The students practice using the writing process (e.g. prewriting, writing, revising, editing, publishing).
5. The teacher provides opportunities for the students to explore various forms of writing.
6. The teacher models and the students practice using correct capitalization and punctuation, grammar, spelling, sentence fluency and organization in their daily writing.
7. The teacher models and students practice using verbs, nouns, and adjectives in their writing.

Topoka Public Schools
2005
**EARLY READING INTERVENTION (ERI)**

Name of Instructor ________________________________  
School: ________________________________

Coach: ________________________________  
Date: ________________________________

Number of Students in Group: ________________________________  
Start & Stop Time: ________________________________

Lesson Number ________________________________  
Total Time of Observation: ________________________________

<table>
<thead>
<tr>
<th>2</th>
<th>High Level of Implementation</th>
<th>1</th>
<th>Inconsistent Level of Implementation</th>
<th>0</th>
<th>Low Level of Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Skill Code</td>
<td>Prep (minutes)</td>
<td>Pacing</td>
<td>Delivery</td>
<td>Student Engagement</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
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<tr>
<td>3</td>
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<tr>
<td>4</td>
<td></td>
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<tr>
<td>5</td>
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<tr>
<td>6</td>
<td></td>
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<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Preparation</th>
<th>Materials ready</th>
<th>Materials not sequential</th>
<th>Materials gathered at the last minute</th>
</tr>
</thead>
</table>
| Pacing      | Lesson begins promptly  
Each activity begins  
Promptly and finishes in allotted time | Lesson begins promptly, BUT  
Time is lost in transition between some activities | Late start  
Some activities over maximum time |
| Delivery (Follows Script) | Follows script including error correction procedures | Usually follows script  
Doesn’t follow correction  
Procedure 100% of the time | Follows script less than 70% of the time |
| Student Engagement | All students on task at least 80% of the time | Most students on task at least 80% of the time | Many students NOT on task 80% of the time |

Comments

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Rev. 3/5/09
# READING MASTERY

## Name of Instructor

## School:

## Coach:

## Date:

## Number of Students in Group:

## Start & Stop Time:

## Lesson Number:

## Total Time of Observation:

## Materials and Time

<table>
<thead>
<tr>
<th>Area</th>
<th>Level of Implementation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher and student materials ready</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher organized and familiar with lesson</td>
<td>2 1 0</td>
<td></td>
</tr>
</tbody>
</table>

## INSTRUCTION/PRESENTATION

<table>
<thead>
<tr>
<th>Area</th>
<th>Level of Implementation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Follows steps and wording in lessons</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Uses clear signals</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Provides students many opportunities to respond</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Models skills/strategies appropriately and with ease</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Corrects all errors using correct technique</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Provides students adequate think time</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Presents individual turns</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Moves quickly from one exercise to the next</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Maintains good pacing</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Ensures students are firm on content prior to moving forward</td>
<td>2 1 0</td>
<td></td>
</tr>
</tbody>
</table>

* Completes all parts of teacher-directed lesson | 2 1 0 |

## General Observations of the Group

<table>
<thead>
<tr>
<th>Area</th>
<th>Level of Implementation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student engagement in lesson</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Student success at completing activities</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher familiarity with lesson formats and progression through activities</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher encouragement of student effort</td>
<td>2 1 0</td>
<td></td>
</tr>
</tbody>
</table>
TRIUMPHS
(You will need a copy of the lesson from the TE to complete this checklist)

Interventionist: ____________________________  School: ____________________________
Observer: ________________________________  Date: ________________________________
Number of Students in Group: ____________  Lesson #: ____________________________
Start Time (Clock Time): ________________  Stop Time (Clock Time): ________________

<table>
<thead>
<tr>
<th>Skill</th>
<th>Level of Implementation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>High</td>
<td>Medium</td>
</tr>
<tr>
<td>Material Preparation</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Teacher has all materials ready for lesson</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decoding (Phonics/Structural Analysis)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I Do: Teacher Models and follows script</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>We Do: Teacher follows script using proper corrective feedback for errors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You Do: Teacher follows script using proper corrective feedback for errors</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Pacing of section is appropriate</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Vocabulary Words</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Teacher follows script using proper corrective feedback for errors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pacing of section is appropriate</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Comprehension</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I Do: Strategy and Skill</td>
<td></td>
<td></td>
</tr>
<tr>
<td>We Do: Text Reading</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Teacher follows script using proper corrective feedback for errors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You Do: Partner Reading</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher follows script using proper corrective feedback for errors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pacing of section is appropriate</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Fluency</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Teacher follows script</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Total Time of Instruction: __________________________

Code: 2-points: High level of implementation
1-point: Inconsistent level of implementation
0-points: Element absent or not observed

Observation Notes: _____________________________________________
____________________________________________________________________
____________________________________________________________________

Rev. 3/5/09  22
Example: Fidelity Checklist #5

Read Naturally / Power Reading
Fidelity Checklist

Interventionist: ____________________ School: ____________________
Observer: ________________________ Date: ______________________
Number of Students in Group Observed: ______ Day of Intervention: ____________
Start Time (Clock Time): ____________ Stop Time (Clock Time): ____________

Code: 2-points: High level of implementation
       1-point: Inconsistent level of implementation
       0-points: Element absent or not observed

Read Naturally / Power Reading

<table>
<thead>
<tr>
<th>Step</th>
<th>Level of Implementation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Picking a Story &amp; Tape</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student selects a new story at the appropriate level</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Cold Reading</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher times and records errors for 1-minute</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher practices missed words with students</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher tells student the number of WRC &amp; assists in graphing performance</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Key Word Review and Prediction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher practices key words with students</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher prompts for prediction</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Reading with the Tape</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher monitors and assists as necessary</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Student reads with tape 2 times</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Reading Practice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher monitors and assists as necessary</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Student reads passage at least 3 times to attain goal level</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Answering Comprehension Questions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher monitors and assists as necessary</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Partner Hot Timing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher ensures student reads with a partner or teacher 1 more time to check if ready for hot timing</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Hot Reading</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teacher times and records errors for 1-minute</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher tells student the number of WRC &amp; assists in graphing performance</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher checks student performance in relation to goal level and states if passed reading passage</td>
<td>2 1 0</td>
<td></td>
</tr>
<tr>
<td>Teacher checks comprehension question accuracy</td>
<td>2 1 0</td>
<td></td>
</tr>
</tbody>
</table>

General Observations of the Group

<table>
<thead>
<tr>
<th>Area</th>
<th>Level of Implementation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Student engagement in lesson</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Student success at completing activities</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Teacher familiarity with steps and procedures</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Teacher encouragement of student effort</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Students progress through steps smoothly</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

**Total Time of Instruction:** __________

Teacher Engaged in All Steps of the Process with at least 1 Student: Yes  No

**Observation Notes:**

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Appendix J:
Approaches for Measuring Outcome Measures
Example #1: Checklist for Getting Started

- What program / intervention will you start with?
- Who will be involved in the outcome measurement team for planning and implementation?
- Who will manage the process?
- Will you need outside help with your work?
- What additional costs do you anticipate and how can you budget for them?
- What resources are available to conduct outcome measurement?
- What is the timeline for your outcome measurement process?

Example #2: Outcome Checklist

- Are the outcomes related to the core of your program / intervention?
- Is it within your control to influence the outcomes?
- Are your outcomes realistic and attainable? Are your outcomes achievable within the funding and reporting periods?
- Are your outcomes written as change statements—will things increase, decrease or stay the same?
- Is there a logical sequence among your short-term, intermediate and long-term outcomes?
- Are there any big “leaps” in your outcomes (i.e., gaps in the progression of impacts)?

Example #3: Performance Indicators Checklist

- Do your indicators make sense in relation to the outcomes they are intended to measure?
- Are your indicators directly related to the outcome? Do they define the outcome?
- Are your indicators specific?
- Are your indicators measurable or observable? Can they be seen (i.e., observed behaviour), heard (i.e., participant interview) or read (i.e., student records)?
- Is it reasonable that you can collect data on the indicators? Is it likely within your resources to do so?
Example #4: Things to Consider When Selecting the Best Method for Data Collection

- Type of information needed: Ideally, data should be collected in more than one way – a mix of qualitative and quantitative methods

- Validity and reliability of methods

- Resources available (i.e. staff availability and expertise, time, money)

- Cultural appropriateness: using the broadest definition of culture to ensure methods are consistent with the language, norms, and values of those whom you are collecting data

Example #5: Various Data Collection Methods

- Surveys
- Observation
- Interviews
- Record or document review
- Focus groups

Example #6: Checklist for Selecting Data Collection Methods

**Surveys**
1. What perspective do I need data from?
2. Do I have a way to get it from these individuals in a systematic way?
3. Do I need data that are standardized so that statistical comparisons can be made? (For example, will I need to report percents or other statistics?)
4. Will participants be able to understand the survey questions? (Consider age, cultural backgrounds, etc.)
5. Do participants have the necessary knowledge or awareness to accurately answer questions about the outcomes?

*If you have answered YES to questions #1 through 5, surveys may be appropriate for collecting data on your outcomes and indicators.*

**Interviews**
6. Are more in-depth answers necessary to adequately measure the indicators or to get information on what is needed or what should change?
7. Will it be necessary for someone to personally ask participants questions (either on the phone or in person) in order to collect the information related to this outcome? (Consider age, cultural backgrounds, as well as state of mind or receptivity of participants.)
If you have answered YES to questions #6 and 7, interviews may be appropriate for collecting data on your outcomes and indicators.

Observations
8. Is it difficult to accurately measure the indicators by asking people questions about opinions or perception?
9. Can this outcome or indicator be assessed accurately by someone trained to observe it in action — can something actually be observed?
10. Do you have the staff resources for someone to observe events, conditions, interactions or behaviours?

If you have answered YES to questions # 8, 9 and 10, observation may be appropriate for collecting data on your outcomes and indicators.

Internal Record Review
11. Do you have individualized records, reports, logs or other systematic ways that you track things in your program / intervention?
12. If an information system exists, are the data consistently entered into it in a timely way?
13. If a system exists, can information be extracted from it easily?

If you have answered YES to questions #11, 12 and 13, internal record review may be appropriate for collecting data on your outcomes and indicators.

Official Record Review
14. Do official records exist which track the data you need on your outcomes and indicators?
15. Are the data accessible to you — will it be possible to get the cooperation of outside agencies or institutions in order to get access to official records?

If you have answered YES to questions #14 and 15, official record review may be appropriate for collecting data on your outcomes and indicators.

Example #7: Checklist on Data Collection

☐ When would change occur—immediately, gradually or over a long period of time?

☐ Are there milestones that can be measured along the way to the outcome you are trying to achieve?

☐ What is the frequency of contact with the organizations with which you are working—once, weekly, monthly or at some other interval?

☐ When will data be available? (When are some of your internal records available)?

☐ Are there any groups that might serve as comparison groups?

☐ Do you have baseline data you can use as a standard?
Are you accountable for short-term outcomes or longer-term impacts?

Example #8: Planning Checklist

- Is the data collection method (survey, interview, observation, internal records, official records) appropriate for the outcomes and indicators?
- Does the plan rely on external sources of data or require collaboration with other agencies? If so, will it be possible to get the data?
- Have the tools/questions been pre-tested?
- Are the measurement approaches and tools culturally relevant?
- Can the approach/tools likely be implemented within available program resources?
- Does the data collection schedule include time point(s) that follow completion of services or program activities?
- Does the frequency of data collection match time points when realistic progress can be expected from participants?
- Does the frequency of data collection match the level of contact with participants? (e.g., greater frequency with greater level of contact)
- Are the roles and responsibilities clear for all the staff involved in collecting data?
- Is there a staff person (or staff team) responsible for managing and monitoring the process to assure the work is completed on time and is of high quality?

Example #9: Data Collection Designs

<table>
<thead>
<tr>
<th>Type of Design</th>
<th>Collection Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-only Measures</td>
<td>Data are collected once: at the end of the program / intervention</td>
</tr>
<tr>
<td>Pre/Post Measures</td>
<td>Data are collected twice: at the beginning to establish a baseline and the end of the program / intervention</td>
</tr>
<tr>
<td>Time Series</td>
<td>Data are collected a number of times: during an ongoing program / intervention and in follow-up</td>
</tr>
<tr>
<td>Measures with a Comparison Group</td>
<td>Data are collected from two groups: one group that receives the program / intervention and one that does not</td>
</tr>
<tr>
<td>Measures with a Comparative Standard</td>
<td>Data are collected once: at the end of the program/ intervention and are compared with a standard</td>
</tr>
</tbody>
</table>

*Information synthesized from The Compassion Capital Fund, Measuring Outcomes*