

FWL Education Research & Development RFP Response

Re: DIP Training Program

EVALUACTION
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Introduction:

The purpose of this document is to provide EvaluAction Associates' response to Far West Laboratories' RFP regarding the evaluation of the Determining Instructional Purposes (DIP) Training Program. As outlined by FWL, the key objectives of this evaluation will be to assess whether the program is worthy of marketing investment, and if so, to provide specific recommendations for how it should be marketed. Proposal will discuss evaluation methods, task schedule/timing, project staffing & professional fees.

Description of program to be evaluated:

The purpose of the DIP Training program is to provide school administrators and future administrators (i.e., Educational Administration graduate students) the skills needed to effectively plan school programs, and to do so in a highly cost and time effective manner. Self-administered by purchasing institutions, each program unit consists of 4-6 modules of 2-3 hours in length. Modules consist of print reading materials as well as individual and small group practice activities that simulate real world planning scenarios.

Units have been designed to be administered intensively (e.g., 2-day retreat) or over time (e.g., weekly sessions). There are three training units (*Setting Goals, Analyzing Problems, Deriving Objectives*). Units relate to one other, but are self-contained and sold individually. The price per individual unit (per participant) is \$8.95. A single coordinator's handbook must also be purchased at a per unit cost of \$4.50.

The DIP program is not currently on the market, nor has it been administered in an actual or simulated training environment as of yet. As such, all marketing related components (e.g., targeting, packaging and pricing) are subject to evaluation input.

Evaluation methods:

As stated previously, the purpose of this evaluation will be to inform DIP marketing efforts (including whether or not to invest behind the program). Our proposed approach focuses on three key evaluation activities: a market assessment, "live product testing" and marketing positioning focus groups (executed online). The rationale and details of each of these activities is discussed individually below (as well as in the task schedule).

Market assessment

The purpose of the market assessment is to assess the competition and understand where the DIP program fits in the marketplace. Importantly, this market assessment will not be limited to close-in offerings (low cost, self-run programs) but encompass broader alternatives (e.g., hiring a consultant, graduate schools, etc.), so as to help ultimately establish a marketing positioning for the DIP training program.

A secondary purpose is to establish a clear picture of the target market. This relates to sector (e.g., public vs. private, K-12 vs. higher ed, high vs. low income districts) as well as key decision maker role/title. For example, is the key decision maker someone who would participate in (or perhaps lead) an eventual internal DIP program administration?

The market assessment will consist of a series of discussions with relevant Far West product, marketing and sales personnel as well as independent EvaluAction web research. While subsequent stage product testing and marketing focus groups will further inform this effort, it is vital to assess the market upfront so as to ensure the proper audience is solicited for the live program-testing phase.

Live product testing (training program assessment)

As the most important of the marketing “Ps” is the product itself, the proposed work includes a comprehensive goal-based evaluation of the DIP program based on actual administration to targeted training recipients. As there are multiple targets (e.g., administrators and graduate students), multiple DIP program units and multiple means of administration (weekly or intensive) that arguably each need to be evaluated, it will be necessary to prioritize. As a “stake in the sand”, this initial proposal allows for one intensive 1.5-day workshop with administrators involving a single DIP unit and one 4-6 week program implementation involving graduate students and a second DIP unit.

The targeted number of participants for inclusion in the “live” administration scenarios is 10. While ten may reflect the upper bound of an effective planning group, this number will produce both maximum feedback (and networking opportunity for the participants). Transportation, meals and lodging for administrators will need to be covered, but we believe DIP participation can be positioned as a valuable free training opportunity and thus not necessitate direct participant compensation. An acceptable recruiting radius from the Bay area will be established (e.g., 100 miles) to limit transportation expense.

EvaluAction’s desirable Bay area location and relationship with UC Berkeley’s Graduate School of Education is an advantage relative to attracting relevant administrator and graduate student participation. We can arrange for events to be hosted at Berkeley (and during the summer leverage graduate housing) in exchange for a brief (and soft) grad program pitch. Historically, this has always been a win-win for all involved.

To attract participants, we will need to work together to craft the appropriate recruitment materials and message. We would anticipate creating a micro-site and eventually a private Google+ community to support this effort. Given the lead-time in soliciting relevant administrators for a 1.5-day commitment and a likely ideal window of availability (summer and preferably June), recruitment efforts will need to commence as soon as the market assessment is complete. Efforts to obtain participants may involve the use of targeted e-mail blasts and/or digital/social media efforts. EvaluAction has an existing relationship with an external recruitment firm.

The weekly graduate student DIP program administration will be executed first. This will allow a graduate student to in turn serve as the coordinator for the administrator workshops and create the most realistic program implementation. This will also allow for any fine-tuning of the assessment vehicles prior to the administrator implementation.

The assessment of the training program has two different thrusts. The first thrust relates to what degree the DIP program delivers on its intended objectives. This will

take on the form of a traditional goal based evaluation. DIP program objectives will be translated into a battery of questions to be asked of program participants at the conclusion of each module and the overall unit relating to the program effectiveness.

A few open-ended questions will also be asked at the outset of the unit allowing participants to state their personal learning objectives, as these may differ from the actual DIP objectives. These will then be revisited in the summative assessment. The mechanism for administering these assessments will be an anonymous online survey that can be complete via participant mobile devices.

Given the need to inform marketing approaches, the summative assessment will also include a traditional (& non-anonymous) focus group discussion. These questions will relate to more complex topics such as the packaging of units, price and value perceptions, optimal administration timeframe, comparison to other programs, perceived coordinator importance and participant readiness to serve in that capacity moving forward, likelihood to recommend, additional unit purchase intent, etc. EvaluAction will work with FWL to flesh out this list.

We believe the question of the internal coordinator role particularly needs to be probed. The DIP program hinges upon an internal coordinator who has already gone through the program. This, however, necessitates a two-step implementation process (to train the coordinator and then the actual internal program administration). And a belief in the ability of an internal “amateur” coordinator to successfully manage the process.

As the cost of the individual units is low, we would recommend sending all administrator participants home with up to 10 additional units to remove the barriers to internal implementation. This will also enhance the opportunity for assessing longer-term program impact. Given the small number of participants, this longer-term follow-up will be executed via a combination of phone calls and an e-mailed survey link.

Marketing Focus Groups

Given that marketing related topics will be probed with DIP program participants, why conduct an additional online focus group? First of all, it is likely the DIP program may evolve as a result of the initial product testing. Furthermore, it is important to understand how potential buyers perceive the product based on the limited information of a marketing communication versus a 12-hour first-hand program trial. (As an aside, a free condensed online training program for coordinators is a tactic worth further discussion).

We believe an online focus group is ideal for this purpose of discussing marketing positioning concepts. This will be an asynchronous environment, where a new series of questions are posted daily for 3-4 days via an anonymous discussion forum type environment. The online focus group allows for a greater number of participants (up to 20) and the ability to dynamically adjust the line of questioning from day to day. The online focus group is also significantly less expensive to execute. The main expense will be recruitment and individual compensation (typically \$75 to \$150, depending on question depth. The specific marketing element focus of the online groups will be TBD

based on what is learned earlier in the evaluation. For example, alternate positionings can be explored or the relative appeal of the DIP program versus specific competitors.

Staged evaluation reports

Given how each core evaluation activity informs the next, we are proposing the creation and presentation of a series of reports after each core evaluation activity.

Task Schedule:

- Wk. 0: Project award, meeting scheduling, initial data requests
- Wk. 1-2: Kick-off/stakeholder meetings
- Wk. 3-4: Evaluator's program description (marketing questions preliminary only)
- Wk. 5-8: Conduct external research & present marketing assessment (report 1)
- Wk. 8-10: Determine recruitment strategy & create supporting materials
- Wk. 10-12: Recruit participants & finalize scheduling of workshops
- Wk. 12-14: Create/review/approve formative and summative questionnaires
- Wk. 14-20: DIP program administration against graduate students
- Wk. 22: Discussion of grad student evaluation (report 2a) & refinement of surveys
- Wk. 24: DIP program administration against school administrators
- Wk. 26: Discussion of administrator evaluation (report 2b) & focus group recos
- Wk. 27-30: Recruitment and material development for online marketing focus groups
- Wk. 30: Online marketing focus group (mediated by EvaluAction)
- Wk. 32: Final marketing recommendations (report 3)

Project Personnel:

Project lead: Mike Pennella, President

After 12 years in public school administration (SFUSD), Mike formed EvaluAction Associates in 2004. Prior to his educational career, Mike spent five years in marketing and advertising. Mike has two graduate degrees, an MA in Educational Administration from UW Madison and a Masters in Educational Technology from Boise State. Mike is a member of the AEA and a frequent guest editor of *New Directions for Evaluation*.

Project support: Karen Smith, Associate

Karen is a 2010 graduate from UC Berkeley's Graduated Education Program in Evaluation and Assessment. Prior to grad school, Karen spent six years teaching a variety of middle school subjects in SFUSD. Karen also holds a BA in Education from

Vanderbilt University and is the current AEA chair for the topical interest group Integrating Technology into Evaluation.

Budget:

The budget needed to support the proposed evaluation work is \$46,210. Please see below for additional detail.

Total budget: \$46,210

- **Grad student workshop (2-3 hours executed over 4-6 weeks): \$2,250**
 - No recruitment cost: affiliation with college
 - Coordinator payment and travel (FWL provided or independent): \$750
 - Participant compensation: \$1500 (\$30 dinner per diem/5 wks/10 students)
- **Administrator workshops (1.5 days): \$8,060**
 - Recruitment/target marketing: \$2000
 - Per diems: \$3460 (One night lodging (\$122), 2 days meals (\$112), Mileage (100 mile radius * \$0.56 per mile * 2) * 10 participants)
 - Banquet networking dinner: \$1000
 - Coordinator payment (grad student): \$600 (12 hours * \$50)
 - Free DIP materials: \$1000 (1 coordinator handbook (\$5) plus 10 additional participant units (\$9) * 10 participants: units)
- **Online marketing focus group: \$3,000**
 - Recruitment: \$1000 (efficiencies associated with earlier process)
 - Participant compensation: \$2000 (20 * \$100 = \$2000)
- **Monthly retainer: \$32,000 (\$4,000 per month * 8 months)**
 - Principal: \$2,500 per month (\$125/hour * 20 hours (50% dedicated))
 - Associate: \$1,500 per month (\$75/hour * 20 hours (50% dedicated))
- **Research materials and subscriptions: \$750**
- **Microsite and Online Focus Group hosting: \$150**
- **Travel:** No incremental billing for on-site FWL visits given the proximity of EvaluAction's offices to San Francisco.

Concluding statement:

Thank you for the opportunity to provide this RFP response. We believe our decade of evaluation experience in the educational sphere and our consistent track record for translating evaluation into action will make us an ideal partner for FWL.

We would also welcome the opportunity to meet with you in person (we are just across the bridge!) and discuss any questions or concerns you might have. We are also happy to put you in touch with relevant client references.