

October 17, 2016

# Using GEAR UP Data Effectively and in a Meaningful Way: Telling Your Story of Change

Presented At:

**GEAR UP West conference**

Presented By:

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**metis associates**

making a meaningful difference

# Goals for this session

- Understand how GEAR UP stakeholders can use data to tell their story and improve results for students and their families
- Get ideas for tools, processes, and practical strategies around data collection, analysis and reporting



# Overview of Oregon GEAR UP

- 21 Oregon communities funded through a state grant (and 10 additional communities funded through the Ford Family Foundation)
- Most of the 53 participating schools are located in high poverty, rural areas
- Flexible school models that follow a common research-based framework: the 5 Rs



# Why use data?



- Facilitate grant management
- Assess overall program fidelity to figure out what works, for whom, when and how
- Identify promising practices and challenges
- Inform programmatic decisions
- Engage key stakeholders
- Demonstrate program impact and tell your story
- Fulfill federal reporting requirements



# Topics covered in this session

- Using data to design your GEAR UP program (developing and communicating your theory of change)
- Using data to assess implementation and impact, and inform programmatic decisions (which data, types of analyses)
- Sharing data to engage key stakeholders (different audiences and formats)



# Theory of change

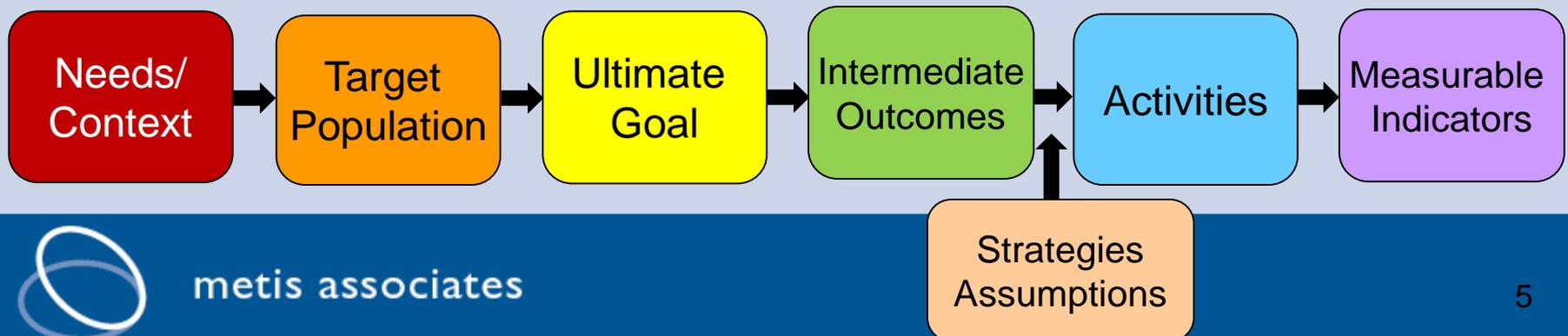
## Definition:

“A Theory of Change (TOC) is a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context.” (Center for Theory of Change)

## Why Use A Theory of Change?

- Provides a visual representation of the change you want to see in your community and how you expect it to come about
- Promotes a shared understanding about what is success and what it takes to get there
- Allows stakeholders to test hypothesis, track progress, and measure success

## Backwards mapping:



# OREGON GEAR UP – College. It's not a dream, it's a plan.

## CONTEXT/NEED

By 2020, 70% of all jobs in Oregon will require some type of education or training after high school. Yet, only 37% of adults in Oregon hold a postsecondary degree. Among GUC communities, only 54% of adults have attended college and only 26% have a two-year degree or higher.

Rural communities face a number of challenges, including:

- Local economic decline and high poverty
- Under-resourced schools with low graduation rates and limited availability of rigorous courses
- Geographic isolation which results in difficulties:
  - attracting and retaining high quality/specialized teachers
  - bringing in resources to schools (e.g., speakers, PD)
  - exposing students to out-of-school experiences (e.g., college trips)
  - maintaining high attendance for school and school-related events among students and families
- Local culture that has historically undervalued postsecondary education and/or is unfamiliar with college selection, application, and financing.

## GOAL

To increase the number of low-income students who are prepared to enter and succeed in postsecondary programs.

## TARGET POPULATION

Low-income and underserved students and their families in 54 middle and high schools in 31 school districts.

## INPUTS

Funding from USDOE and The Ford Family Foundation

District support (dollar and in-kind match)

Oregon GU staff's technical assistance, professional development, networking, and administrative support  
OSU resources (e.g., summer camps, Beaver Hangouts)

Participating schools and communities

Incentives (food and swag)

Partners:

- Local school partners
- Higher ed institutions
- Metis (evaluator)

## EVIDENCE-BASED FRAMEWORK



## ACTIVITIES

### For schools:

- Professional development, ongoing support from GU school liaisons and other staff, data reports and site visit support, and GU resources (e.g., toolkits, newsletters, website, research briefs)
- Curriculum development and alignment
- Infusion of technology
- Development of local partnerships

### For students:

- Rigorous coursework
- Academic supports (e.g., advisement, tutoring, enrichment, and summer programs)
- Mentoring and social-emotional learning supports
- Career/college readiness supports: classes, advisement, workshops, panels, job shadowing, internships, fairs, college visits, Photo Booths

### For families:

- School events, trips, workshops, panels, communications and individualized assistance

## OUTCOMES

### SCHOOL OUTCOMES

#### Short and mid-term

- ✓ School leadership and quality teaching
- ✓ Greater involvement of school staff in college access work
- ✓ Curriculum vertically aligned
- ✓ Increased number of accelerated learning and rigorous courses
- ✓ Development of partnerships

#### Long-term

- ✓ Sustained college-going culture
- ✓ Systems of college and career readiness supports
- ✓ College prep curriculum
- ✓ Sustained partnerships

### STUDENT OUTCOMES

#### Short and mid-term

- ✓ Stronger cognitive and social-emotional skills
- ✓ Increased sense of agency and self-advocacy skills
- ✓ Improved academic behaviors and performance
- ✓ Completion of advanced courses
- ✓ Higher postsecondary education expectations and career/college awareness
- ✓ Completion of college entrance activities (ACT/SAT, applications, scholarships)

#### Long-term

- ✓ Increased high school graduation rates
- ✓ Increased postsecondary education enrollment, persistence and completion

### FAMILY OUTCOMES

#### Short and mid-term

- ✓ Increased postsecondary education expectations and opportunities
- ✓ Knowledge of college selection, application, and financial aid process
- ✓ Increased involvement in school and students' education

#### Long-term

- ✓ FAFSA completion
- ✓ Local culture of continued and lifelong learning

# Communicating Your Vision/Model

## Program staff, partners, funders

- Share vision (TOC) at the onset of the program
- Share TOC when onboarding new staff or partners
- Revisit TOC at staff, partner, funder meetings
- Align reporting to TOC

## Schools

- Involve educators and leadership in developing the TOC
- Introduce TOC at GEAR UP kick-off events for students and/or staff
- Review TOC at staff meetings and/or PDs to generate awareness

## Families and Communities

- Seek input from families/community members to shape the vision
- Discuss the vision and model at GEAR UP community/family events
- Share/reinforce vision through other communications: parent newsletters, mailings, website



## Activity 1 (5 minutes)

- Assess the extent to which your program has a clear vision/model and how it is being communicated
  - Fully accomplished
  - Partially in place
  - Not in place/Beginning stage
- Write down one or two things you may want to do differently



# What data should we collect?

- Depends on the target audience and how you plan to use it
- Quantitative AND qualitative
- Multiple data sources and respondent groups
- Purposes:
  - To help schools:
    - Plan for activities
    - Assess effectiveness of school-based interventions
    - Learn about promising practices
  - To assess overall implementation, progress towards performance measures, and impact (across schools)



# Quantitative data

Data elements	Types of data sources	Types of analyses
<ul style="list-style-type: none"> <li>• <b>Implementation/service data</b> <ul style="list-style-type: none"> <li>○ # activities, sessions, participants, hours per participant, activity attendance rates</li> <li>○ Feedback on activities (relevance, quality, usefulness)</li> </ul> </li> <li>• <b>Outcome data:</b> <ul style="list-style-type: none"> <li>○ Academic achievement (e.g., state assessments, course enrollment and completion, GPA, credits earned, grade promotion)</li> <li>○ School attendance</li> <li>○ School behaviors (e.g., suspensions)</li> <li>○ High school graduation</li> <li>○ PSAT and SAT completion/scores</li> <li>○ FAFSA completion</li> <li>○ Scholarship applications</li> <li>○ College applications</li> <li>○ College enrollment, retention, and graduation data</li> <li>○ Expectations/knowledge/attitudes for postsecondary education</li> <li>○ Educator and school practices</li> </ul> </li> <li>• <b>Student demographic data</b> (e.g., grade level, gender, race/ethnicity, English language learner status, disability status, free and reduced-price lunch, first-generation status)</li> <li>• <b>School data</b> (e.g., school size, number of staff, qualifications, turnover, # advanced courses, community statistics)</li> </ul>	<ul style="list-style-type: none"> <li>• Web-enabled participation database</li> <li>• PD and activity feedback forms</li> <li>• Student/school data from schools and/or state education department</li> <li>• National Student Clearinghouse</li> <li>• Student, parent, and educator surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Descriptive analyses</li> <li>• Longitudinal analyses</li> <li>• Dosage analyses linking services and outcomes</li> <li>• Impact analyses through comparison group design (RCT, QED, etc.)</li> </ul>

# Qualitative data

Focus/topics	Types of data sources	Types of analyses
<p><b>Focus:</b> understanding the why, and the how; putting a face to the data</p> <p><b>Topics assessed:</b></p> <ul style="list-style-type: none"> <li>• Context/needs</li> <li>• Promising practices</li> <li>• Challenges</li> <li>• Perceived impact (and examples depicting impact)</li> <li>• Suggestions for improvement</li> </ul>	<p><b>Respondent Groups:</b></p> <ul style="list-style-type: none"> <li>• program staff,</li> <li>• partner organizations/vendors</li> <li>• school leadership</li> <li>• educators</li> <li>• students</li> <li>• parents/families</li> </ul> <p><b>Methods:</b></p> <ul style="list-style-type: none"> <li>• Interviews</li> <li>• focus groups</li> <li>• observations of activities</li> <li>• site visits</li> <li>• feedback forms</li> </ul>	<ul style="list-style-type: none"> <li>• Content analyses identifying common themes, patterns and unique contexts</li> <li>• Vignettes, case studies and success stories</li> </ul>



## Activity 2 (10 minutes)

- Assess your program's data collection practices
  - Fully in place
  - Partially in place
  - Not in place/beginner stage
- Write down one or two ideas for new data elements, respondent groups, or data sources you could use to inform your work



# How do we share/use data?

Key audience	Strategies/Formats for Sharing Data
Program staff	<ul style="list-style-type: none"> <li>• Ongoing GEAR UP participation reports</li> <li>• <a href="#">School planning tool</a> and <a href="#">school-specific reports</a></li> <li>• Annual comprehensive evaluation report</li> <li>• Ongoing meetings with evaluator</li> <li>• Dashboard</li> </ul>
School staff (leadership, educators)	<ul style="list-style-type: none"> <li>• School-specific reports (e.g., survey and outcome findings)</li> <li>• <a href="#">Sharing of best practices and success stories</a> through educator newsletters, website, and presentations/meetings</li> <li>• <a href="#">GEAR UP factsheets/briefs</a></li> <li>• Dashboard</li> </ul>
Students	<ul style="list-style-type: none"> <li>• School-specific findings through interactive activities</li> <li>• Success stories</li> </ul>
Families/community	<ul style="list-style-type: none"> <li>• GEAR UP newsletter</li> <li>• Website (e.g., feature stories)</li> <li>• Presentations and handouts (e.g., factsheets) at family/community events</li> </ul>
External stakeholders such as elected officials, policy makers, research field, USDOE	<ul style="list-style-type: none"> <li>• Short policy briefs or factsheets</li> <li>• Presentations/meetings with elected officials, policy makers, and community stakeholders</li> <li>• Articles in peer-reviewed journals</li> <li>• APR, biennial and final reports to USDOE</li> </ul>

## Activity 3 (10 minutes)

- Assess your program's practices around using/sharing data
  - Fully in place
  - Partially in place
  - Not in place/beginning stage
- Write down one or two ideas for how you could share your data/story with key stakeholders



# Questions?



## Contact information

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## Using GEAR UP Data Effectively and in a Meaningful Way (GEAR UP West Conference)

Presenters: Julia Alemany ([jalemany@metisassoc.com](mailto:jalemany@metisassoc.com)) and Jennica Vincent ([jvincent@oregonstate.edu](mailto:jvincent@oregonstate.edu))

Activity #1: Shaping and Communicating Your Vision			
Goals	Possible Strategies	Rate Your Progress <span style="color: green;">●</span> Fully in place <span style="color: yellow;">●</span> Partially in place <span style="color: orange;">●</span> Not in place/beginning stages	Identify Action Steps
Develop a theory of change/vision with explicit goals, outcomes, activities/strategies, and assumptions	<ul style="list-style-type: none"> <li>Seek input from key stakeholders to inform vision</li> <li>Develop a visual tool (theory of change or logic model) to communicate vision</li> </ul>		<i>Please write down one or two things you could do to develop and/or communicate your vision/TOC with stakeholders</i>
Communicate theory of change/vision with program staff and partners	<ul style="list-style-type: none"> <li>Staff/partner onboarding</li> <li>Staff meetings</li> <li>Align reporting to theory of change to reinforce understanding of vision/model</li> </ul>		
Communicate theory of change/vision with students	<ul style="list-style-type: none"> <li>GEAR UP kickoff meetings or events</li> </ul>		
Communicate theory of change/vision with school leaders and educators	<ul style="list-style-type: none"> <li>GEAR UP kickoff meetings</li> <li>Staff meetings</li> <li>Staff training</li> </ul>		
Communicate theory of change/vision with families and community members	<ul style="list-style-type: none"> <li>GEAR UP events</li> <li>Website</li> <li>Newsletters</li> <li>Handouts</li> </ul>		
Revisit your theory of change on an annual basis to identify new needs, goals, and activities	<ul style="list-style-type: none"> <li>Use stakeholder meetings so input from various groups is represented</li> </ul>		

### Resources:

- What is a theory of change: <http://www.theoryofchange.org/what-is-theory-of-change/>
- How to develop a logic model (Kellogg Foundation Manual): <http://www.smartgivers.org/uploads/logicmodelguidepdf.pdf>
- Oregon GEAR UP's detailed theory of change: <http://oregongearup.org/sites/oregongearup.org/files/grant/plans/theoryofchange.pdf>

## Activity #2: Collecting/Analyzing Data

Key topic		Rate Your Progress <span style="color: green;">●</span> Fully in place <span style="color: yellow;">●</span> Partially in place <span style="color: orange;">●</span> Not in place/beginning stages	Identify Action Steps
What types of <b>qualitative data</b> are you collecting? From whom? What analyses are you conducting?	<b>Topics assessed:</b> <ul style="list-style-type: none"> <li>Context/needs</li> <li>Promising practices</li> <li>Implementation challenges</li> <li>Perceived impact (and examples of impact)</li> <li>Suggestions for improvement</li> </ul>		<i>Please write down one or two ideas of new/enhanced qualitative data practices (topics of interest, new method, seeking input from a specific respondent group)</i>
	<b>Respondent Groups:</b> program staff, partner organizations/vendors, school leadership, educators, students, parents/families  <b>Methods:</b> interviews, focus groups, observations of activities, site visits		
	<b>Types of Analyses:</b> <ul style="list-style-type: none"> <li>Content analyses identifying common themes, patterns and contexts</li> <li>Vignettes, case studies and success stories</li> </ul>		
What types of <b>quantitative data</b> are you collecting? From whom? What analyses are you conducting?	<b>Types of data:</b> <ul style="list-style-type: none"> <li>Implementation/service data (e.g., #s and feedback)</li> <li>Student demographics, academic achievement (e.g., course grades, test scores, grade promotion, credits earned, GPA), school attendance, school behaviors, high school graduation</li> <li>College enrollment, retention and graduation</li> <li>Students and parents' college and career readiness measures</li> <li>Teacher/school practices</li> </ul>		<i>Please write down one or two ideas of new/enhanced qualitative data practices (e.g., additional types of data to collect, untapped data sources, types of analyses)</i>
	<b>Data sources:</b> <ul style="list-style-type: none"> <li>Program participation database</li> <li>Student data from schools or state ed dept.</li> <li>Student, educator, and parent surveys</li> <li>National Student Clearinghouse data</li> </ul>		
	<b>Types of Analyses:</b> <ul style="list-style-type: none"> <li>Descriptive analyses</li> <li>Longitudinal analyses</li> <li>Dosage analyses (linking participation or services to outcomes)</li> <li>Comparison group design</li> </ul>		

### Activity #3: Reporting and Sharing Data with Key Stakeholders

Key Audience	Examples of Strategies/Formats	Rate Your Progress <span style="color: green;">●</span> Fully in place <span style="color: yellow;">●</span> Partially in place <span style="color: orange;">●</span> Not in place, beginning stages	Identify Action Steps <i>Please write down one or two new ways in which you would like to share your data or tell your story</i>
Program staff	<ul style="list-style-type: none"> <li>Ongoing GEAR UP participation reports</li> <li>School planning tool and school-specific reports</li> <li>Annual comprehensive evaluation report</li> <li>Ongoing meetings with evaluator</li> <li>Dashboard</li> </ul>		
School staff (leadership, educators)	<ul style="list-style-type: none"> <li>School-specific reports (e.g., survey and outcome findings)</li> <li>Sharing of best practices and success stories through educator newsletters, website, and presentations/meetings</li> <li>GEAR UP factsheets/briefs</li> <li>Dashboard</li> </ul>		
Students	<ul style="list-style-type: none"> <li>School-specific findings through interactive activities</li> <li>Success stories</li> </ul>		
Families/community	<ul style="list-style-type: none"> <li>GEAR UP newsletter</li> <li>Website (e.g., feature stories)</li> <li>Presentations and handouts (e.g., factsheets) at family/community events</li> </ul>		
External stakeholders such as college and university personnel, elected officials, policy makers, research field, USDOE	<ul style="list-style-type: none"> <li>Short policy briefs or factsheets</li> <li>Presentations/meetings with elected officials, policy makers, and community stakeholders (e.g., Chamber of Commerce, City Council, Rotary, Elks)</li> <li>Articles in peer-reviewed journals</li> <li>APR, biennial and final reports to USDOE</li> </ul>		

Examples from Oregon GEAR UP:

- Site visit report: <http://oreongearup.org/sites/oreongearup.org/files/grant/surveys/2015-16datareport-cohort.pdf>
- School planning tool: <http://oreongearup.org/sites/oreongearup.org/files/grant/plans/planningtool-cohort.pdf>
- Annual reports (briefs/factsheets): <http://oreongearup.org/about/results>
- Feature stories (e.g., best practices, success stories): <http://oreongearup.org/feature-story>