November 2022

OPA EVALUATION TA

Checklist for Program and Evaluation Staff Working in Schools

This checklist is designed to support organizations that deliver teen pregnancy prevention programs in schools and organizations that evaluate those programs. It includes guidance, tips, and best practices for successfully working with teachers and school administrators throughout the grant period. The guidance has been organized into specific steps to take before, during, and after program implementation.

Overview of key steps to take in working with schools:

Before program implementation

1. Complete background research prior to meeting with school decision makers.
2. Ask targeted, practical questions during your meeting.
3. Follow up on your meeting promptly.

During implementation

1. Get to know students and teachers.
2. Deliver your program and collect data.
3. Debrief with teachers after each session (if applicable).

After implementation

1. Debrief with teachers and school administrators to identify lessons learned and areas for improvement.
2. Maintain the relationships, partnerships, and assets that you built.

Next, we discuss these steps in more detail, define key questions to raise and answer, and share the types of information and resources you will need to build a strong partnership with schools.

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Before implementation

Key questions to answer before implementation:

- **Who makes decisions about which programs to implement and evaluate?** These tend to be people in a range of positions depending on the district. The decision makers could be the superintendent, the principal, the teachers, or a group of people in different positions.
- **What is the best time and place to schedule a meeting with decision makers?** Different schools and districts have different preferences and availabilities. Find out whether it is best to schedule a meeting before or after school, during a lunch break, or at some other time. Some decision makers prefer a remote meeting, but others might prefer an in-person meeting on campus. If possible, try to schedule an in-person meeting. Often, people are more focused at in-person meetings, which can help ensure that no details are missed and all questions are answered. In-person meetings are also helpful in building rapport. If a remote meeting is preferred, consider a videoconference.
- **What are expectations for obtaining parental consent prior to youth receiving curricula?** Schools and districts will have different procedures and preferences for keeping parents informed. Some schools may require permission forms, and other schools may want you to hold a parent information night to get buy-in from parents. Some schools may allow passive consent for programming but require active consent for an evaluation. Talk to the schools about what they require.

Step 1: Complete background research prior to meeting with school decision makers.

- ☐ Understand who the key stakeholders are at the school. In many cases, these stakeholders include school administrators, teachers, counselors, and parents. Background research can help assess the priorities of the stakeholders and allow you to tailor your meeting preparation accordingly.
- ☐ Tailor plans to the student population. Ideally, you have done a needs assessment and found a program that meets the needs of the specific population and corresponds to the priorities of the stakeholders.
- ☐ Prepare program materials and your pitch. The pitch should match the needs of the population, which is why a needs assessment is often a good idea. Present services from a position of asking how you can serve the school, instead of dictating what you think the school needs. Be prepared to address:
  - What you are asking, or what would you like to have happen
  - What the program covers, including themes and key points
  - What sample program materials look like
  - Study timelines
- ☐ Identify the correct decision makers at each school.
  - In some districts, it may be more effective to approach each school individually instead of approaching the district as a whole. For each school, decide how to build a relationship that will make it easier for you to provide services. In other districts, programs must be approved at the district level. In these cases, focus on understanding the decision-makers at the district level and how your program can provide services for schools across the district.
  - Meet with school counselors or psychologists. This will help to understand the school's needs and how the program can meet students' needs.

- ☐ Consider what information schools will need from you and what your educators will need from the school. Ideally, you will have identified necessary program and evaluation-related logistics when planning for the grant application, like scheduling needs for:
  - Implementing the program (number of sessions, length of time for each session, and so on)
  - Data collection activities (observations, focus groups, performance measures, surveys – including satisfaction surveys, and so on)
  - Identify how to simplify the process for the decision makers you meet with.

Step 2: Ask targeted, practical questions during your meeting.

- ☐ Ask about the school's population and specific logistical or programmatic needs in the local context. This can include questions about the following:
  - Barriers to attendance and participation
  - Other programming in the school that may affect implementation and/or student participation
  - Preferred form of communication: Be flexible with your communication strategies to respond to preferences of the decision makers. Consider using text, phone, or email.
- ☐ Ask about the best times to schedule pre (before programming) and post (after programming) surveys. If your program aligns with the start of the school year, it is generally advisable to schedule pre-surveys as soon as school starts. Because the first week of school is usually an introductory period for the class, having the students complete surveys that week generally does not interfere as much with teachers' schedules and lesson plans. If your program does not align with the start of the school year or overlap with a semester, try to schedule the surveys before programming begins and, in a way to minimize the impact on teachers' schedules and lesson plans. Similarly, try to schedule post-surveys toward the end of the semester or after the program has been completed.
- ☐ Ask about school-wide policies and expectations that may affect program implementation and data collection activities.
- ☐ Ask about schedules for end-of-grade and state-mandated tests. You may need to adjust the program, schedule of sessions, and data collection activities to accommodate test dates. However, not all schools will have specific dates for testing prior to the start of the school year, so flexibility with scheduling to accommodate test dates is important.
- ☐ Ask questions about transportation, bell schedules, block schedules, and potential holidays/school closures that may affect implementation and data collection activities.
- ☐ Ask about expectations for approaching and meeting with classroom teachers, such as whether program staff can schedule post-session check-ins with teachers.
- ☐ Ask about protocols for parent permission forms and expectations for making sure parents are aware of the content.
- ☐ Ask about the best contact for developing a memorandum of understanding (MOU) on behalf of the school, which specifies the responsibilities and activities that you both agree to. Ask about the process and timeline for approval.
- ☐ Ask about having teachers and students complete a post-program evaluation.

Step 3: Follow up on your meeting promptly.

- ☐ Respond to questions quickly. If there were any questions during the meeting that you were unable to answer, try to find the answer and respond as soon as possible. Make sure the school has your contact information, so school personnel can ask other questions that might come up after the meeting.
- ☐ Document the discussion, action steps, and agreements in writing and distribute this information to all applicable parties.
- ☐ Take appropriate steps to get an MOU signed and in place for implementation and data collection.

During implementation

Key questions to answer during implementation:

- **What are the needs of the specific classroom?** The teacher can help advise you on the general classroom dynamics and whether there are any students with social or emotional challenges or special needs. This can help inform how you deliver the program to the students and collect data.
- **What role will the teacher play during the program and data collection?** Some teachers may want to be fully involved in classroom management while you deliver the program and collect data. Others may prefer to give you full control of the classroom. It will be helpful to work with the teacher to find an option you both feel comfortable with and to be flexible with this throughout the program.
- **How will you receive feedback during the program?** It is often helpful to debrief with the teacher after each session. This can help you tailor the delivery of the program in future sessions so that it is best suited to the students and the classroom environment. If you are unable to debrief with the teacher after each session, consider asking whether there is an alternative way for you to receive regular feedback throughout the program.

Step 1: Get to know students and teachers.

Suggested timeline: Approximately two weeks prior to the start of the program

- ☐ Schedule a meeting with classroom teachers to discuss program expectations. If the program will be in multiple classrooms, it may be more efficient to have a joint meeting with all teachers. Present teachers with an overview of the program, including length and duration of sessions, your goals for the program, and your plans for data collection.
- ☐ Get to know the students by asking the teacher to provide a general overview of the class. Ask if there are students to be conscious of, such as those with social or emotional challenges or special needs.
- ☐ If necessary, make plans to tailor the program to address the needs of all students. If you are implementing an evidence-based practice, you should be extremely cautious about making major adaptations, and you should plan on checking with the program developers for program-specific guidance on adaptations as well as your project officer for approval.
- ☐ Review program topics and activities with the teacher. Discuss if and how they fit with the teacher's curriculum.
- ☐ Ask about time management and limitations in the classroom.
- ☐ Identify what role the teacher will play and prepare them accordingly. In particular, you may want to discuss the following:
    - Who will be responsible for classroom/behavior management
    - Specific issues to be aware of in class

Step 2: Deliver your program and collect data.

- ☐ Deliver the lesson with or without assistance from the teacher, depending upon defined roles and classroom needs. You may need to be flexible throughout the program as you determine what classroom management strategies work best.
- ☐ Identify questions or topics to discuss with the classroom teacher as you go. This can help you tailor the program and data collection activities to the needs of the students and the classroom environment.
- ☐ Collect data to support your evaluation. Some of your data collection activities may occur right before and after implementation, such as surveys, while others may occur during implementation, such as observations and fidelity logs.

Step 3: Debrief with the teacher after each session (if applicable).

- ☐ Document questions or concerns and identify ways to respond during future sessions. Teachers may help troubleshoot issues, such as a student acting up or lack of student engagement.
- ☐ Ask for feedback and suggestions for improvement and try to incorporate these ideas into your remaining program sessions.
- ☐ At the conclusion of each session, collect teacher and student evaluations.

After implementation

Key questions to answer after implementation:

- **How can the program and evaluation be improved in the future?** Even if you have had regular debriefs with the teacher after each session, it can be useful to meet with both teachers and school administrators after the program concludes. This can provide the big picture of how the program was successful and how it can be improved. For evaluation activities, you may want to understand whether data collection activities could be streamlined in a way to minimize burden on teachers.
- **What are the next steps?** If you would like to continue the program in the future, establish next steps for doing so right after the first program concludes. Decision makers may be particularly willing to continue the program if they see how you suggest to tailor the program in the future based on the feedback.
- **How will you maintain the relationships you built?** Maintaining relationships with teachers, school administrators, and other staff can position you well for future opportunities.

Step 1: Debrief with teachers and school administrators.

Suggested timeline: Immediately after program ends or a week later, if possible

- ☐ Ask for feedback on the experience and suggestions for improvement. If you have areas where you would feedback, raise those points proactively.
- ☐ As feasible, share preliminary data or lessons learned, such as performance measures or participant satisfaction results. This can help teachers and school administrators better understand the way students engaged with the program. If you are unable to provide this information at the debrief session, follow up when data are available.
- ☐ Discuss next steps for continuing the partnership, framing next steps around how to tailor the program in future implementations, based on feedback from teachers and administrators.

Step 2: Maintain the relationships that you built.

- ☐ Continue to build and maintain relationships with school decision-makers. Try to stay abreast of staff changes, as this can support future planning and respond proactively to changes (for example, when a principal leaves a school).