

NEW MEXICO SUMMER 2006 TRANSITION INSTITUTE
Team Planning Tool for
Improving Postsecondary Education and Employment
Outcomes through Interagency Connections



June 4 - 7, 2006

Inn of the Mountain Gods
Mescalero, New Mexico

**TEAM PLANNING TOOL FOR
IMPROVING POSTSECONDARY EDUCATION AND EMPLOYMENT OUTCOMES THROUGH INTERAGENCY CONNECTIONS**

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Additional resources are available at:
<http://homepages.wmich.edu/~kohlerp/research>

- Taxonomy for Transition Programming
- Worksheet for Student-Focused Planning and Student Development Practices
- Worksheet for Student Development Practices (example)
- Worksheet for Interagency Collaboration
- Worksheet for Family Involvement
- Worksheet for Program Structures

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**Team Planning Tool for
Improving Postsecondary Education and Employment Outcomes through Interagency Connections**

Team Information	4
Transition-Focused Education	5
Overview of Team Planning Tool	7
Part 1 – Current Implementation Assessment	8
Part 2 – Needs Assessment	14
Part 3 – Program Planning	20
Checklist for Identifying and Evaluating Program Goals, Activities, Outputs, and Outcomes	32

Team Planning Tool for Building Systems that CARE

Team Information

Team Name: _____ Primary Contact: _____ Position: _____ Organization: _____ Address: _____ _____ Phone: _____ Fax: _____ E mail: _____	Team Member: _____ Position: _____ Organization: _____ Address: _____ _____ Phone: _____ Fax: _____ E mail: _____
Team Member: _____ Position: _____ Organization: _____ Address: _____ _____ Phone: _____ Fax: _____ E mail: _____	Team Member: _____ Position: _____ Organization: _____ Address: _____ _____ Phone: _____ Fax: _____ E mail: _____
Team Member: _____ Position: _____ Organization: _____ Address: _____ _____ Phone: _____ Fax: _____ E mail: _____	Team Member: _____ Organization: _____ Address: _____ _____ Phone: _____ Fax: _____ E mail: _____ <i>To include all members, use back of page if necessary</i>

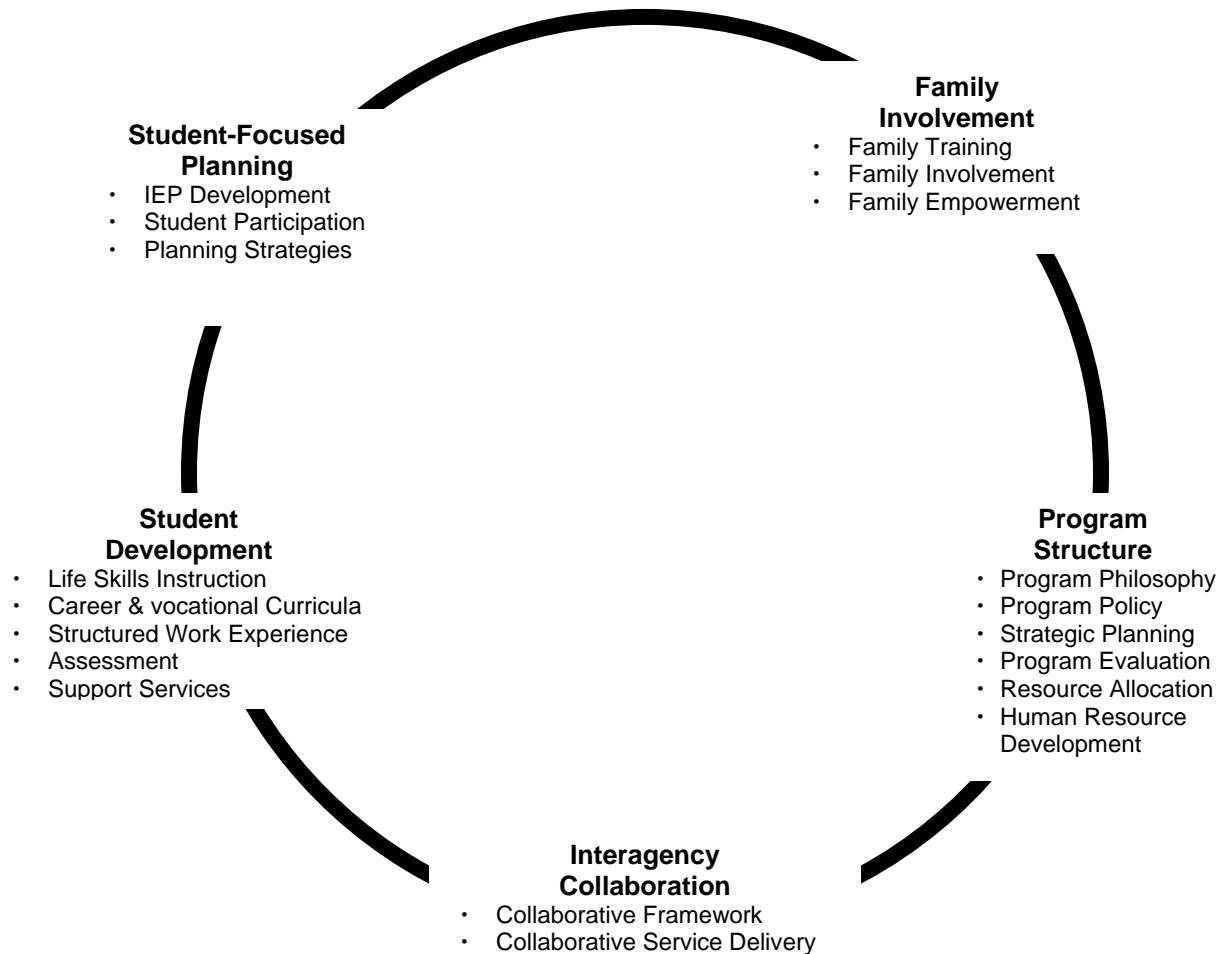
Transition-Focused Education

This planning tool focuses on assisting school-community teams to review and plan their strategies for improving students' postsecondary education and employment outcomes. Over the past decade, transition practices research has illustrated that post-school outcomes of students with disabilities improve when educators, families, students, community members, and organizations work together to implement a broad perspective of transition planning, more appropriately referred to as transition-focused education. In general, this concept of transition-focused education represents the perspective that “transition planning” is the fundamental basis of education that guides development of students' educational programs, rather than an “add-on” activity for students with disabilities when they turn age 14 or 16. The impact of transition-focused education is greatly enhanced when systems and programs connect and support the implementation and application of such learning.

Transition-focused education is directed toward adult outcomes and consists of academic, career, and extracurricular instruction and activities delivered through a variety of instructional and transition approaches, responsive to the local context and students' learning and support needs. Primary to the concept of transition-focused education is the expectation for *all* students to achieve a quality life, valued within the context of their family, school, and community. Quality of life outcomes include those in four general areas: independent living (home and family), employment (including postsecondary education and training that lead to employment), community citizenship and participation, and leisure and recreation. To prepare students to achieve such outcomes, transition-focused education builds student competence through academic, occupational, and social development. Further, to insure that all our students can develop and achieve at their greatest potential, transition-focused education provides a variety of instructional pathways that may include few or no specialized supports to extensive applied experiences or supports. This framework of transition-focused education provides a structure for educational planning that is outcome-oriented and promotes greater involvement and ownership in the decision-making process by key stakeholders.

The *Taxonomy for Transition Programming*, represented on the next page, provides concrete practices—identified from effective programs—for implementing transition-focused education. As described in the next section, this tool is designed to help you reflect broadly on your application of student-focused planning and interagency collaboration—two categories of practices in the taxonomy.

TAXONOMY FOR TRANSITION PROGRAMMING



Taxonomy for Transition Programming



STUDENT
DEVELOPMENT

INTERAGENCY
COLLABORATION

FAMILY
INVOLVEMENT

PROGRAM
STRUCTURE

STUDENT-FOCUSED PLANNING

IEP Development	Student Participation	Planning Strategies
<ul style="list-style-type: none"> ▶ Options identified for each outcome area or goal ▶ Post-secondary education or training goals and objectives specified in the IEP ▶ Vocational goals and objectives specified ▶ Community-related and residential goals and objectives specified (e.g., voting) ▶ Recreation and leisure goals and objectives specified ▶ Educational program corresponds to specific goals ▶ Goals are measurable ▶ Personal needs are addressed in planning (e.g., financial, medical, guardianship) ▶ Specific goals and objectives result from consumer choices ▶ Progress or attainment of goals is reviewed annually ▶ Responsibility of participants or agencies specified <p>Evaluation of participant fulfillment of responsibilities</p>	<ul style="list-style-type: none"> ▶ Planning team includes student, family members, and school and participating agency personnel ▶ Assessment information is used as basis for planning ▶ Transition-focused planning begins no later than age 14 ▶ Meeting time adequate to conduct planning ▶ Preparation time adequate to conduct planning ▶ Planning meeting time and place conducive to student and family participation ▶ Accommodations made for communication needs (e.g., interpreters) ▶ Referral to adult service provider(s) occurs prior to student's exit from school ▶ Planning team leader identified 	<ul style="list-style-type: none"> ▶ Self-determination facilitated within the planning process ▶ Planning decisions driven by student and family ▶ Planning process is student-centered ▶ Student involvement in decision making ▶ Documentation of student interests and preferences ▶ IEP involvement training for students ▶ Career counseling services provided to student ▶ Student self-evaluation of process

Taxonomy for Transition Programming

STUDENT-FOCUSED
PLANNING

STUDENT
DEVELOPMENT

FAMILY
INVOLVEMENT

PROGRAM
STRUCTURE



INTERAGENCY COLLABORATION

Collaborative Service Delivery

- Coordinated requests for information (e.g., to parents, employers)
- Reduction of system barriers to collaboration
- Collaborative funding and staffing of transition services
- Collaborative development and use of assessment data
- Coordinated and shared delivery of transition-related services
- Systems information disseminated among cooperating agencies
- Collaborative program planning and development, including employer involvement
- Collaborative consultation between special, “regular,” and vocational educators
- Collaboration between post-secondary education institutions and the school district

Collaborative Framework

- Interagency coordinating body that includes consumers, parents, service providers, and employers
- Formal interagency agreement
- Roles of service providers clearly articulated
- Established methods of communication among service providers
- Student information shared among agencies via established procedures (with appropriate release of information and confidentiality)
- Single-case management system
- “Lead” agency identified
- Designated transition contact person for all service providers

Overview of Team Planning Tool

This planning tool focuses on assisting teams to review their practices associated with implementing Student-Focused Planning and Collaboration practices within the *Taxonomy for Transition Programming*, such as developing transition-focused individual education programs, teaching and facilitating student involvement in their IEP development, and implementing collaborative service delivery at the individual and community levels. We suggest you use a team approach to reflect on the *extent* to which and *how* you currently implement these transition-focused education practices, identify your strengths and needs, and develop specific goals to address your needs. This worksheet is designed to help guide you through this process.

Use **Part 1—Current Implementation Assessment**, to reflect on the degree to which you are implementing the practices described. To assist with this reflection, we provide a set of questions and indicators that focus on each area. These questions are designed to help you go beyond simple “yes” or “no” answers as you reflect on implementation and identify evidence that supports your reflection.

In **Part 2—Issues and Barriers**, consider your findings from Part 1 and summarize your specific issues that may inhibit or limit implementation and/or effectiveness.

Use **Part 3—Program Planning** to develop plans that address your needs. In developing your plans, be specific. Refer to the guidelines on the last page of this tool to help you set meaningful, achievable, and measurable goals. It is helpful to identify specific goals that your team can achieve in the next year, and then the activities you will implement to achieve your goals. Also think about the things you will produce (products), the outcomes you want to achieve, and how you will tell if you achieved them.

Remember that the purpose of these efforts is to improve student outcomes! *Thus, one’s efforts must begin and end with the knowledge of what students are achieving after leaving high school.* The questions included herein focus primarily on educational processes and services, designed to provide students with the skills they need to live and work independently. Specific reflective questions focused on students’ post-school outcomes are listed below. They should guide your reflection and provide the basis for all your educational and transition programs and services.

Fundamental Questions

- Regarding short-term outcomes, do your students have the skills they need to be successful
 - Academic skills?
 - Independent living skills?
 - Occupational skills?
 - Work behaviors?
 - Self-determination skills?
- Regarding long-term outcomes, are your students
 - Employed?
 - Living independently?
 - Participating in their communities?
- Do your students have the educational and community supports and services they need to be successful?

Part 1: Current Implementation Assessment

Use the following **Implementation Level Rating Scale** to indicate to what extent you are implementing the practices described. Also describe evidence that illustrates the practice is being implemented at the level indicated. Use the reflective questions and suggested indicators to help clarify and expand the reflective process. The reflective questions are designed to help you go beyond simple “yes” and “no” responses and substantively reflect on the degree of implementation in each area. The questions and indicators also help provide examples of evidence you might examine to determine the implementation level. An example is provided.

Implementation Level Rating Scale

- DK - We don't know the status of practices in this area – We need more information
- 1 - This is not occurring, this does not happen, or this is not evident.
- 2 - This seldom occurs, this happens with/for a few students, or this is seldom evident.
- 3 - This usually occurs, this happens with/for a moderate number of students, or this is usually evident.
- 4 - This always occurs, this happens with/for most students, or this is always evident.

Example:

STUDENT-FOCUSED PLANNING	IMPLEMENTATION LEVEL	EVIDENCE OF IMPLEMENTATION
3. Age-appropriate assessment information is used to identify students' strengths, preferences, interests, choices, and needs.	DK 1 (2) 3 4	SPED teachers work with class and individual students in home rooms and resource rooms to review assessment info and plan IEP meetings and content
5. Students participate meaningfully in their IEP development.	DK 1 2 (3) 4	TOPS IEP review data = 95% of students attended IEP IEP meeting eval indicated only about 50% of students actively participate

A. STUDENT-FOCUSED PLANNING	IMPLEMENTATION	EVIDENCE OF IMPLEMENTATION
<p>1. Students' IEPs include <i>measurable</i> post-school goals in the following areas:</p> <ul style="list-style-type: none"> a. Education and/or training b. Employment c. Independent living 	<p>DK 1 2 3 4</p>	
<p>2. Students' IEPs include <i>measurable</i> annual goals and transition services (e.g., instruction, community experiences, etc.), including course of study, that will enable them to achieve their post-school goals.</p>	<p>DK 1 2 3 4</p>	

STUDENT-FOCUSED PLANNING—CONT'D	IMPLEMENTATION	EVIDENCE OF IMPLEMENTATION
3. Age-appropriate assessment information is used to identify students' strengths, preferences, interests, choices, and needs.	DK 1 2 3 4	
4. Students, families, educators, and relevant service providers work together to plan and provide instruction and services.	DK 1 2 3 4	
5. Students participate meaningfully in their IEP development.	DK 1 2 3 4	

STUDENT FOCUSED PLANNING—CONT'D	NOTES
<p>Reflective Questions</p> <ul style="list-style-type: none"> ▶ To what extent do students and their parents actively participate in the development of their Individual Education Program (IEP)? ▶ Do students have the knowledge and skills to participate actively? ▶ How are students' strengths, interests, needs, and preferences determined and documented? ▶ To what extent do students' educational programs include student-identified goals and objectives? How many goals are student-initiated? ▶ To what extent and how is academic, cognitive, vocational, and/or adaptive behavior assessment information used in developing educational goals and objectives and to determine related service needs? To what extent is transition-related assessment information reflected in students' educational programs? ▶ To what extent and how is information gathered through career awareness and exploration activities subsequently linked to a student's educational program? ▶ To what extent are the transition goals and objectives identified in students' educational programs implemented and evaluated? ▶ What strategies are used to insure that students, parents, agency personnel, and other appropriate individuals actively participate in planning meetings? ▶ How is participation measured? What are the findings? ▶ To what extent and how are the responsibilities assigned through the IEP process reviewed? To what extent do identified services go undelivered? ▶ What procedures are used to address discrepancies between services promised and services provided? <p>Suggested Indicators</p> <ul style="list-style-type: none"> ▶ # students with PLAAFP regarding transition goals and services based on transition-related assessments ▶ # students with measurable post-school goals ▶ # IEP goals that are student-initiated ▶ # students with goal-related annual objectives and transition services ▶ # students attending their IEP meeting; level of student participation ▶ # students whose course of study aligns with post-school goals 	

B. INTERAGENCY COLLABORATION	IMPLEMENTATION	EVIDENCE OF IMPLEMENTATION
<p>1. Formal collaborative agreements and structures are established among schools, employers, employment-related agencies, and post-secondary institutions.</p> <p>These agreements clearly articulate roles and responsibilities to assure the following occur in culturally appropriate ways:</p> <ul style="list-style-type: none"> a. Methods of communication b. Information sharing protocols c. Referral protocols d. Service and task responsibilities e. Funding responsibilities f. Points of contact 	DK 1 2 3 4	
<p>2. Educators, service providers, and employers work together to identify and address transition education and service needs of <i>individual students in ways that are responsive to their cultural and linguistic backgrounds</i>.</p>	DK 1 2 3 4	
<p>3. Educators, service providers, and employers work together to identify and address <i>school and community level</i> transition education and service issues, including program development and evaluation, based upon <i>the community context</i>.</p>	DK 1 2 3 4	

INTERAGENCY COLLABORATION –CONT'D	NOTES
<p>Reflective Questions</p> <ul style="list-style-type: none"> ▶ How many schools have up-to-date collaborative agreements with their local service agencies, employment agencies, youth development programs, etc.? ▶ What agencies and/or organizations are included in the agreements? ▶ Are formal meetings held? How often? ▶ Is information available and disseminated regarding agency services, eligibility requirements, and referral protocols? ▶ How and to what extent do various educators and service agencies coordinate, collect, and share assessment information? ▶ How are students' service needs determined and communicated? ▶ To what extent do rehabilitation counselors, and/or other relevant service providers actively participate in IEP development and/or meetings? ▶ How many students are receiving rehabilitation and/or other services? What services? ▶ How are parents and students informed about the differences between secondary IDEA services and post-secondary and/or adult services under 504 and ADA? ▶ How are businesses and labor unions involved in identifying standards, developing curricula, participating in career awareness and exploration, providing work-based education, and providing professional development for teachers? ▶ How are community-level transition service needs identified? ▶ What services do students need but do not get? ▶ How many and what services are projected for the future? <p>Suggested Indicators</p> <ul style="list-style-type: none"> ▶ # and content of agreements ▶ Action plans; assessment results of action plan implementation ▶ Agency information products; dissemination records ▶ Agency fairs: # participants, # attendees, attendee satisfaction ▶ Record of student service needs identified by students, parents, educators, service providers <ul style="list-style-type: none"> ▪ # of service providers invited and attending IEP meetings ▶ Student support needs identified in the IEP ▶ # and description of business/community partners ▶ Community partner survey data (needs and/or satisfaction) ▶ Collaboration protocols or action plans ▶ # and type of projected service needs; # and type of unmet needs ▶ # students referred for agency services; # students receiving services 	

Part 2: Needs Assessment

Instructions

Use the responses from your implementation assessment in Part 1 to identify current *strengths* of your student-focused planning and collaboration practices. Then, using your identified strengths as a baseline, identify specific *needs*. Subsequently, code your identified needs with respect to their priority or immediacy (e.g., high priority/immediate need, moderate priority/intermediate need, or lower priority/long-term need).

Example

STUDENT-FOCUSED PLANNING	CURRENT STRENGTHS	NEEDS	PRIORITY
5. Students participate meaningfully in IEP development	Most students attend their IEP meeting	<ul style="list-style-type: none"> ▶ Allotted time for IEP meeting not adequate for facilitating meaningful student participation ▶ Need to include pre-IEP preparation—development of goals, choices, course of study—within curriculum 	<p>High</p> <p>High</p>

A. STUDENT-FOCUSED PLANNING	CURRENT STRENGTHS	NEEDS	PRIORITY
<p>1. Students' IEPs include <i>measurable</i> post-school goals in the following areas:</p> <ul style="list-style-type: none"> a. Education and/or training b. Employment c. Independent living 			
<p>2. Students' IEPs include <i>measurable</i> annual goals and transition services (e.g., instruction, community experiences, etc.), including course of study, that will enable them to achieve their post-school goals.</p>			

STUDENT-FOCUSED PLANNING	CURRENT STRENGTHS	NEEDS	PRIORITY
<p>3. Age-appropriate assessment information is used to identify students' strengths, preferences, interests, choices, and needs.</p>			
<p>4. Students, families, educators, and relevant service providers work together to plan and provide instruction and services.</p>			
<p>5. Students participate meaningfully in their IEP development.</p>			

B. INTERAGENCY COLLABORATION	CURRENT STRENGTHS	NEEDS	PRIORITY
<p>1. Formal collaborative agreements and structures are established among schools, employers, employment-related agencies, and post-secondary institutions.</p> <p>These agreements clearly articulate roles and responsibilities to assure the following occur in culturally appropriate ways:</p> <ul style="list-style-type: none"> a. Methods of communication b. Information sharing protocols c. Referral protocols d. Service and task responsibilities e. Funding responsibilities f. Points of contact 			

INTERAGENCY COLLABORATION	CURRENT STRENGTHS	NEEDS	PRIORITY
<p>2. Educators, service providers, and employers work together to identify and address transition education and service needs of <i>individual students in ways that are responsive to their cultural and linguistic backgrounds.</i></p>			
<p>3. Educators, service providers, and employers work together to identify and address <i>school and community level</i> transition education and service issues, including program development and evaluation, based upon <i>the community context.</i></p>			

Part 3: Planning Student-Focused Planning and Interagency Collaboration Practices

Instructions

The purpose of this section is to help you make plans for the coming year. Use the responses from your implementation assessment in Part 1 and needs assessment in Part 2 to identify specific goals in each area. Then identify specific goal-related activities, the person(s) responsible for the activity, and the timeframe for implementation. As you are planning, also identify (a) the outputs or products to be produced, (b) your anticipated or expected outcomes, (c) indicators to determine whether the outcomes were achieved, and (d) data sources through which evidence will be collected. As a resource, use the **checklist on the last page** to help you clarify your goals, activities, outputs, and anticipated outcomes.

Example

COLLABORATION PRACTICES			
1. Formal collaborative agreements and structures are established among schools, employers, human service agencies, and post-secondary institutions through which roles and responsibilities are clearly articulated, including: <ul style="list-style-type: none"> a. Methods of communication. b. Information sharing protocols. c. Referral protocols. d. Service and task responsibilities. e. Funding responsibilities. f. Points of contact. 			
GOAL: Increase student referrals and # of students receiving services			
SPECIFIC GOAL-RELATED ACTIVITIES		PERSON RESPONSIBLE	TIMEFRAME
<ul style="list-style-type: none"> ▸ Develop an interagency council ▸ Develop a memorandum of agreement (MOU) ▸ Establish new referral procedures ▸ Develop agency information guides ▸ Identify transition contact for each agency 		<ul style="list-style-type: none"> ▸ Scott (education) with Mary H. (rehab), Peggy (mental health), Craig (employment services), Cindy (community college) 	<ul style="list-style-type: none"> ▸ Complete by Dec. 31 ▸ Complete by Feb. 28 ▸ Develop by June 1 ▸ Develop by June 1 ▸ Complete by Feb 28
OUTPUTS/PRODUCTS	EXPECTED OUTCOMES	POTENTIAL INDICATORS	DATA SOURCES
<ul style="list-style-type: none"> ▸ Interagency council ▸ MOUs ▸ Information guide 	<ul style="list-style-type: none"> ▸ Increased student referral ▸ Increased # students receiving specific services ▸ Increased student employment 	<ul style="list-style-type: none"> ▸ # referrals by agency and service ▸ # students receiving services/agency/service ▸ # students employed 	<ul style="list-style-type: none"> ▸ Agency referral records ▸ Agency service records ▸ Agency “closure” records ▸ Follow-up survey

STUDENT-FOCUSED-PLANNING

FOCUS:

GOAL:

SPECIFIC GOAL-RELATED ACTIVITIES

PERSON RESPONSIBLE

TIMEFRAME

OUTPUTS/PRODUCTS

EXPECTED OUTCOMES

POTENTIAL INDICATORS

DATA SOURCES

STUDENT-FOCUSED-PLANNING

FOCUS:

GOAL:

SPECIFIC GOAL-RELATED ACTIVITIES

PERSON RESPONSIBLE

TIMEFRAME

OUTPUTS/PRODUCTS

EXPECTED OUTCOMES

POTENTIAL INDICATORS

DATA SOURCES

STUDENT-FOCUSED-PLANNING

FOCUS:

GOAL:

SPECIFIC GOAL-RELATED ACTIVITIES

PERSON RESPONSIBLE

TIMEFRAME

OUTPUTS/PRODUCTS

EXPECTED OUTCOMES

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DATA SOURCES

INTERAGENCY COLLABORATION

FOCUS:

GOAL:

SPECIFIC GOAL-RELATED ACTIVITIES

PERSON RESPONSIBLE

TIMEFRAME

OUTPUTS/PRODUCTS

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INTERAGENCY COLLABORATION

FOCUS:

GOAL:

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INTERAGENCY COLLABORATION

FOCUS:

GOAL:

SPECIFIC GOAL-RELATED ACTIVITIES

PERSON RESPONSIBLE

TIMEFRAME

OUTPUTS/PRODUCTS

EXPECTED OUTCOMES

POTENTIAL INDICATORS

DATA SOURCES

**CHECKLIST FOR IDENTIFYING AND EVALUATING
PROGRAM GOALS, ACTIVITIES, OUTPUTS, AND OUTCOMES**

Focus Area	Considerations and Criteria	
Goals	<ul style="list-style-type: none"> ▸ Be specific. ▸ Identify what you are trying to accomplish. ▸ Think in terms of outcomes rather than process or products. ▸ Is the goal achievable within the specified timeframe? 	<ul style="list-style-type: none"> ▸ Is the goal measurable? ▸ Is the goal within the scope of your control? ▸ Is the goal action-oriented? ▸ Is the goal realistic?
Activities	<ul style="list-style-type: none"> ▸ Is the activity action-oriented? ▸ Will the activity move you toward your goal? 	<ul style="list-style-type: none"> ▸ Is the activity theoretically-based? ▸ Is the activity do-able with available resources?
Outputs	<ul style="list-style-type: none"> ▸ Think in terms of “product” – something that will be produced? 	<ul style="list-style-type: none"> ▸ Is the “product” producible with the available resources? ▸ Will the outputs move you toward your goal?
Expected Outcomes	<ul style="list-style-type: none"> ▸ Think in terms of impact—what do you expect to happen as a result of your activities and outputs? ▸ What do you expect to achieve? ▸ Is the expected outcome an important aspect of your goal(s)? 	<ul style="list-style-type: none"> ▸ Is the expected outcome specific? ▸ Is the expected outcome meaningful? ▸ Is the expected outcome measurable?
Outcome Indicators	<ul style="list-style-type: none"> ▸ Are specific indicators needed or required by specific audiences (e.g., Feds, state, etc.?) ▸ What information do you need to answer the important evaluation question(s)? ▸ Is the indicator specific? 	<ul style="list-style-type: none"> ▸ Is the indicator measurable? ▸ Is the indicator meaningful? ▸ Is the indicator short or long-term (need both)? ▸ Is the indicator possible with available resources?
Outcome Data Collection	<ul style="list-style-type: none"> ▸ Are information sources identified? <ul style="list-style-type: none"> ▪ Available from existing sources? ▪ New sources must be developed? ▸ What methods will you use to collect information? <ul style="list-style-type: none"> ▪ Can sampling methods be used? ▪ Must information be collected about all students? 	<ul style="list-style-type: none"> ▸ Who will collect the information? ▸ Do arrangements need to be made for data collection? ▸ Do data collection instruments need to be developed?