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ABSTRACT

Classroom teachers have the best possible vantage point for constructing locally appropriate surveys and tests; the fact is, however, that teachers tend to rely on nationally mass-produced and marketed test packages. The purpose of this paper is to present a procedure for developing and refining teacher-made surveys and tests, which would be valid and reliable for meeting local needs. First, a brief rationale is given for teachers producing their own instrumentation. Next, an easy-to-apply process for developing and pilot-testing one's surveys and tests is presented, a process that requires no computers or statistics, but rather depends on open sharing, discussion, and communication with colleagues. To illustrate these procedures, an actual example of a survey used to evaluate the 1992 Arizona Leadership Academy is provided. Four figures are included. Figures 1 and 2 graphically depict factors to consider in designing locally appropriate instrumentation, and show various perspectives of "expert judges" in the instrumentation pilot-test process. Figures 3 and 4 consist, respectively, of a sample general pilot-test matrix and a pilot-test matrix of expert judges' comments from the 1992 Arizona Leadership Academy Evaluation. Appendices provide a draft of a cover letter to be mailed to pilot-test judges, an initial survey draft, pilot judges' comment sheet, and a final (post-pilot) survey draft. (Contains 20 references.) (LL)

WHEN "DO IT YOURSELF" DOES IT BEST:

THE POWER OF TEACHER-MADE SURVEYS AND TESTS

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by

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Introduction

When it comes to knowing what is best for themselves and their students, there are no better experts than teachers. Their day-to-day classroom observations and activities constitute a wealth of valid and reliable research data. This extensive first-hand experience makes teachers the best craftspersons to design their own surveys, tests and other instrumentation which is ideally suited to their students, classrooms, and school situations.

Despite such natural expertise, the fact is that teachers have tended to shy away from developing their own instrumentation. Part of the reason may be the illusory precision of nationally produced and marketed test packages. "Big-name recognition" and impressive packaging are admittedly as effective in educational marketing as in other selling endeavors.

The irony, however, is that such slick outward packaging is no substitute for (and can actually impair) the usefulness of the product inside. All the impressive formatting in the world cannot compensate for the fact that a given test instrument may have been developed and normed on a group of students totally unlike one's own. Dereshiwsky (1992) has referred to this phenomenon as "the artificial child in Boston," one who may bear no resemblance to the bilingual, low socioeconomic rural school children with whom a teacher interacts every day in a local learning environment. How useful is such a nationally marketed test in terms of assessing the needs and abilities of one's own children -- here and now? The same point can be made about mass-marketed national surveys, and a school district's desire to study a given problem, situation or condition at the local level.

The purpose of this paper is to present a procedure for developing and refining teacher-made survey instrumentation which is most valid and reliable for meeting local needs. (While a survey example will be used throughout this report, a similar argument applies to teacher-made tests.) First, a brief rationale will be given for teachers producing their own instrumentation, as opposed to automatically assuming that purchasing such materials from the outside is "better." Next, an easy-to-apply process for refining one's surveys and tests will be presented: one that requires no computers or statistics, but rather depends on little more than open sharing, discussion and communication which teachers do with their colleagues as a matter of course. To illustrate these procedures, the author will provide an actual example of a survey used to evaluate the 1992 Arizona Leadership Academy.

"To Thine Own Self Be True:" The Teacher as 'Ultimate' Survey Design Specialist

As indicated in the preceding section, classroom teachers have the best possible vantage point for constructing locally appropriate surveys and tests. This is due to their extensive, day-to-day immersion in the situation and setting of the topic of the instrumentation.

Unfortunately, there has been a tendency for such "grounded-theory experts" to distrust their own judgments when it comes to tests and surveys. Instead, there is an overreliance on mass-produced, slickly marketed national packages -- which may be attractive and even easy to use, but which also may have little or nothing to do with the actual circumstances in which the teacher desires to apply them.

Part of this may have to do with the "mystique" of the research process, as well as a resulting fear and insecurity on the part of teachers. Dereshiwsky (1992) has identified two reasons for this avoidance. One has to do with " ... an unfortunate spillover effect from prior coursework experiences in statistics, computers and research design." The second stems from misconceptions such as, "It's too hard (corollary: 'You have to be a genius;' " "it takes too long (with images of Margaret Mead spending 20 years in a primitive location)"; and "it's only for college professors (or master's theses, or doctoral dissertations)." However, as later explained in the same paper:

> ... the true, underlying purpose behind even the most sophisticated quantitative treatment is to answer an actual question ... and no more. To put it another way, without some 'real-life substance' behind it, number-crunching for its own sake is absolutely worthless ... Thus, in actuality, the whole process should begin with an idea, curiosity, or need to know -- it's that simple ... the real star of the show is the research question. (Dereshiwsky, 1992)

All measurements or observations, whatever the outward form or packaging of the research, must possess two qualities in order to be useful in answering the research question(s): they need to be valid and reliable. Validity has to do with credibility: am I measuring what I think I am? Reliability, on the other hand, deals with stability or consistency of the measurement.

As mentioned earlier, the classroom teacher is in the ideal position to assess both of these properties in the measuring instrument which he/she needs to construct. This is because, due to his/her day-to-day involvement, the teacher has had the "longest look" at the individuals being measured or assessed -- their special circumstances, needs, emotions, attitudes, and the like. Such qualitatively accepted "grounded-theory" immersion provides far more opportunity for valid and reliable observation of research needs than "single-shot"

experimental interventions, numeric number-crunched sole indicators of test quality, and so forth.

This is not to imply that one needs to start from scratch and completely disregard other existing tests or surveys, literature reviews, and outside sources of information. Of course it is natural to rely upon existing work as a guide to one's own. The point is that there needs to be a balance and focus on the individual needs and circumstances for which the teacher is intending to use the test or survey.

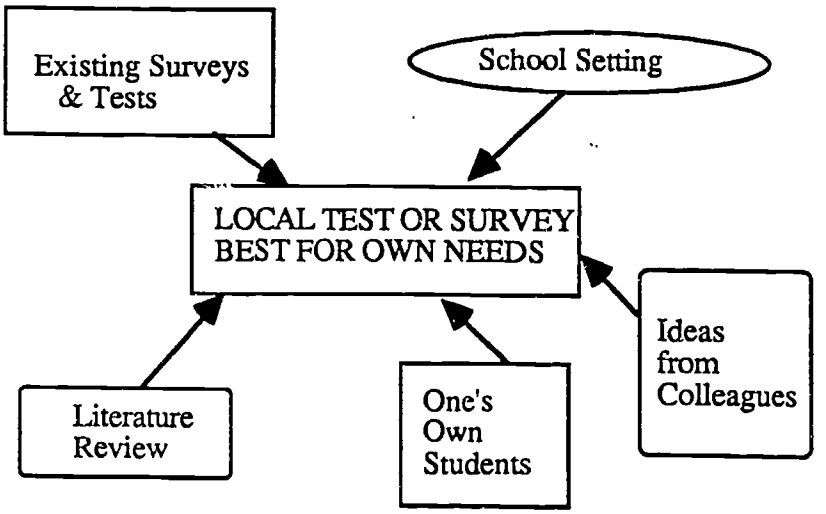
Fowler (1993) makes the following compelling argument for attaining such balance and trusting one's own judgment regarding locally appropriate instrumentation:

> Taking advantage of the work that others have done is very sensible. Of course, it is best to review questions asked by researchers who have done previous work on the study topic. In addition, if questions have been asked of other samples, collecting comparable data may add to the generalizability of the research. The mere fact that someone else has used a question before, however, is *no* guarantee that it is a very good question or, certainly, that it is an appropriate question for a given survey. *Many bad questions are asked over and over again because researchers use them uncritically. All questions should be tested to make sure that they "work" for the populations, context and goals of a particular study.* (pg. 97, emphasis mine)

Figure 1 (below) graphically depicts the process and a few of the multiple sources of developing an initial draft of a test or survey for a locally based research question or need.

Figure 1.

Factors to Consider in Designing Locally Appropriate Instrumentation



"Practice Makes Perfect:" The Revision Process Made (Relatively) Simple

Having debunked at least some of the stereotypes of the research "mystique" in the previous section, it may be necessary to revisit at least one of them at this point. The fact is that no single piece of research, however painstakingly planned and refined, is ever "flawless" per se. This is not meant to imply that it is useless in answering the research question: far from it. Rather, some cautionary notes about its potential expansion, refinement and applicability to other settings and subjects are typically discussed in a section called "Limitations and Delimitations."

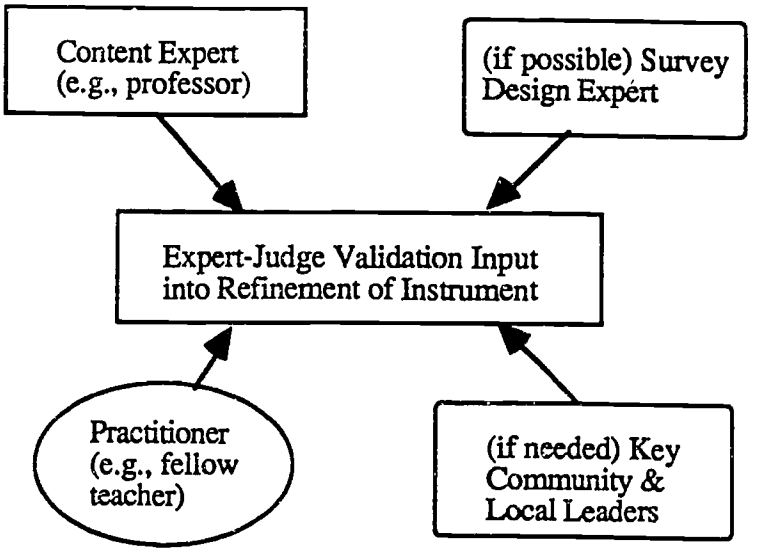
This means that it would be rare for a first draft of a survey or test to be ideal -- no matter how carefully the teacher may have prepared it, considering all of the sources of information in Figure 1. As with manuscripts and the like, it is wise to consider doing a "road test" of one's initial writing effort, in an attempt to find ways to improve it. In survey research, this process is known as pilot-testing.

While sophisticated statistical procedures admittedly exist for pilot-test assessments of survey validity and reliability, it is important to note that they are not the only (or even the BEST way) for a teacher to choose to refine his/her locally developed instrument. One of the quickest, most time- and cost-efficient and naturally intuitive ways to do so is to consider what novice teachers writing a "first exam in ... " have done for years: run their draft by a handful of colleagues. The same procedure is used in survey research and is known as "qualitative expert-judge validation." It simply involves asking a small number of pilot subjects to review the instrumentation and to provide feedback as to its strengths, insufficiencies and recommendations for improvement. (Packard and Dereshiwsky have utilized these three qualities or dimensions in a variety of program evaluation contexts. These include the formative evaluation of a doctoral program in educational leadership (1990) and a baseline needs assessment of a high school academy located in a reservation community (1991).) This does not involve the massive subject pools required for the quantitative indicators: in fact, five to ten such judges is more than ample. The important thing is to get a balance (even one apiece) of such "experts" from a variety of perspectives, as illustrated in Figure 2, page 5.

A number of experts in survey construction and research procedures have enthusiastically endorsed such "expert judge panel" pilot testing. DeVellis (1991) has pointed out the contribution that such expert judges can make in terms of assessing the validity of the instrumentation:

... having experts review your item pool can confirm or invalidate your definition of the phenomenon. You can ask your panel of experts (e.g., colleagues who have worked extensively with the construct in question or related phenomena) to rate *how relevant they think each item is to what you intend to measure* (emphasis in original text; page 75).

Figure 2.
Various Perspectives of "Expert Judges"
in Instrumentation Pilot-Test Process



What form should the collection of suggestions from pilot judges take? The good news for the busy, schedule-constrained teacher is: whatever is most convenient! These 5 to 10 expert pilot judges may provide their thoughts individually in person; in written form at their convenience; on the telephone; or in a new (to education) and maximally efficient format known as a focus group.

According to Richard Krueger (1988), a focus group is a small-group (4-12 subjects) interview in which a relaxed setting is established beforehand by the interviewer, who indicates that all thoughts, opinions and feelings are valued. The objective is to get the participants interacting with, and reacting to, one another as well as to the interviewer. As Krueger has indicated, this is much like the opinion revision and refinement we do in everyday life in response to the thoughts and comments of our friends and colleagues.

The efficiency in using a focus group format for survey piloting is that quite often, expert judges make the exact-same comments and recommendations regarding a survey -- whether their thoughts are solicited individually or in a group setting. The busy teacher can save much time and cost by bringing together his/her pilot subjects for a single one-hour session and obtaining all of their individual feedback in this limited time frame.

Perhaps the best argument for using the focus group approach is the valid and reliable information it provides regarding the "fit" of the instrument for its intended locally appropriate circumstances. As pointed out by Morgan (1988):

> We are rapidly reaching a point at which most general population surveys consist entirely of items that have never been validated outside the confines of other surveys ... The most obvious way that focus groups can assist in item and scale construction is through providing evidence of how the respondents typically talk about the topic in question, a goal that is often summarized as learning their language on a topic. A more important use for preliminary focus groups is to ensure that the researcher has as complete a picture of participants' thinking as possible. This is especially important for making sure that issues that might have been ignored in an ousider's inventory of the topic are included. (page 34)

Once the teacher has selected the handful of pilot judges and the way in which this pilot review will be conducted with them (e.g., individually; focus group; written comments on survey draft), the final decision to be made is how to compile their feedback. Whether through note-taking in an interview setting, receiving individual written comments, or tape-recording, the feedback will eventually have to be sorted out and distilled into a concise and usable fashion in order to produce a refined survey draft.

One such procedure which "tells the story at a glance" is the matrix method. Originally developed and creatively illustrated by Miles and Huberman (1984), the matrix or table shell is a convenient grid which arrays the summarized comments in usually no more than a page or two. Bria and Dereshiwsky (1990) applied the Miles and Huberman matrix to such a pilot-test grid. It can be prepared by the teacher in "worksheet" format beforehand and used to sort, summarize and compile the pilot judges' feedback and is depicted in Figure 3, page 7.

This process, including an actual example of such a pilot-test matrix, will be illustrated in detail in the following subsections. The author will use her own development and refinement of a mailed questionnaire to evaluate the 1992 Arizona Leadership Academy (ALA) to demonstrate the piloting process, matrix generation, and refinement of the survey. First, a brief overview of the nature and goals of the ALA will be provided. This will be followed by a description of the author's specific activities in generating and pilot-

testing the initial draft of the survey. The matrix of pilot judges' responses, along with the revised survey instrument, will be illustrated and discussed.

Figure 3.
Sample General Pilot-Test Matrix

Survey Subsection	Pilot Judges' Comments	Researcher Action Taken
Instructions to Subjects	Summary descriptive phrases and relative frequency counts	Summary descriptive phrases and relative frequency counts
Survey Section I (e.g., demographic items)	Summary descriptive phrases and relative frequency counts	Summary descriptive phrases and relative frequency counts
Survey Section II, etc.	Summary descriptive phrases and relative frequency counts	Summary descriptive phrases and relative frequency counts

An Example of a "Self-Made" Survey: Evaluating the Effectiveness of the 1992 Arizona Leadership Academy

Background Information

The 1992 Arizona Leadership Academy consisted of five days (June 15 - 19, 1992) of on-site large- and small-group activities for principals and teachers ("teams") from throughout the state. The goals of the academy experience, according to its faculty members and program planners, included focus on increased student academic achievement; professional growth; increased statewide and regional networking; improved site-based decision making; and facilitation of school planning and change. The first two days of the Academy were designed for principals only, to provide them with an opportunity for advance team building and facilitation activities, as well as to exchange ideas and concerns with their peers. These principals were subsequently joined by their team members on the third day. In addition to the specific goals outlined above, the teams were expected to develop and refine a specific plan intended to meet a locally appropriate

goal that they would then take back with them and begin to implement after the conclusion of the Academy.

Held on the campus of Northern Arizona University, the ALA was conducted under the leadership of the Arizona State Department of Education. ALA program planners and faculty members consisted of a balance of State Department officials, local administrators and teacher-leaders, and university professors. The author of this paper was designated as the evaluator of the 1992 ALA and worked closely with all three groups in the planning and implementation of the evaluation. A total of approximately 400 participants (faculty members, program planners, team leaders and team members) took part in the 1992 ALA.

Survey Design and Initial Construction

Prior to drafting the survey instrument that ultimately became the primary means of data collection for the 1992 ALA evaluation, the author met with ALA program planners at an initial planning meeting for the Summer 1992 events and activities. In particular, she communicated closely with the Director of the 1992 ALA, Dr. David A. Wayne, in order to identify his objectives and needs for specific information regarding the assessment of Academy effectiveness. The Director also provided the evaluator with extensive written documentation on the program, including predetermined published objectives and participants' goal statements as written during the Academy experience. These various perspectives and sources of information constituted a multimethod approach to the survey design and construction, which in turn served to strengthen the validity of the survey design process by approaching it from multiple viewpoints (Brewer and Hunter, 1989).

Based upon these multiple sources, the author/evaluator identified the following informational needs to be included in the survey:

1. The ALA Director wished to determine if perceptions of ALA program effectiveness differed by the following subgroups of participants:
   a) first-time attendees vs. returnees;
   b) faculty members/program planners, vs. team leaders, vs. team members;
2. The desired way to collect this information was via a mailed survey;
3. The survey was to consist of both demographic items and open-ended items;
4. The open-ended items were intended to obtain participants' impressions of ALA effectiveness with respect to their:
   a) goals for improved student learning;
   b) goals for their own professional development;
   c) any other goals;

5. These three goals were to be assessed according to the following three dimensions or "time frames:"

   a) what they hoped to learn prior to the start of the ALA;

   b) how they are now applying what they actually learned during the ALA;

   c) how the ALA might do a better job with each goal in the future.

Appendix A contains the author's initial draft of this survey, preceded by a cover letter to accompany its mailing to the pilot judges. (The author FAXed these materials to the ALA Director at the State Department, who in turn assumed responsibility for typing them on letterhead and mailing them to recipients.)

In addition, the author/evaluator wished to facilitate the work of the pilot judges by preparing a "worksheet" for them to use in providing their feedback on the survey draft. This worksheet appears in Appendix B.

Pilot-Test Procedures and Results

A packet containing the cover letter, survey draft and worksheet was mailed to each of ten (10) pre-identified pilot judges. Seven (7) usable pilot-test comment packets were received by the specified return deadline. As is typical in qualitative data collection procedures, a veritable wealth of in-depth, revealing information resulted from this process. The pilot judges not only responded in detail on the worksheets, but they also extensively annotated the survey draft itself.

In rereading, clustering and classifying this feedback, the author/evaluator discovered that the individually provided comments converged to a great degree. Thus, she was able to generate a matrix from these responses (Figure 4, pages 10-13). The numbers in parentheses following individual summary phrases indicate how many pilot judges independently made the same suggestion, in cases of multiple mentions. Where no number appears parenthetically, only one pilot judge made the particular comment or suggestion.

Figure 4.
Pilot-Test Matrix of Expert Judges' Comments:
1992 Arizona Leadership Academy Evaluation

Survey Subsection	Pilot Judges' Comments	Researcher Action Taken
Demographics	* Add #2: "In response to Item # 1, above, I am primarily identified as ... " (4): (a) Teacher; (b) Administrator; (c) Parent; (d) School district patron; (e) State Dept. staff member; (f) University faculty member; (g) Mental health services provider; (h) Board member; (i) Other (please specify)	* Included question on primary professional affiliation
	* Add question on "primary location of residence" (4): (a) Rural; (b) Urban; (c) Suburban	* Included question on primary location of residence
	* Ask respondents to identify own school district (4) * DON'T ask respondents to identify school district (3)	* Included an OPTIONAL question asking participants to reveal their district IF they chose to do so

Demographics, con't.	* Add question on "school level" (2): (a) High school; (b) Junior high school; (c) Elementary school	* Included question on school level
	* Ask respondent to identify own role as part of the school team (e.g., leader vs. member) (2)	* Included question on ALA role
	* Ask size of team	* Included question on size of team
	* Ask length of time that the team has been functioning as a team	* Included question on length of time as a team
	* Include a question on cultural/language diversities to match Arizona student demographics with leadership demographics	* Didn't include in this initial survey; possible inclusion in planned follow-up site visits to participating ALA schools

Question #1	* OK as is (2) * Improve format (more spacing) * Was not asked to state goals: such a question might be misleading * Goal statements too limiting (different schools are at different levels of leadership) * Let subjects state <u>own</u> goals	* Added spacing * If this is the case, it should be indicated as such in the actual survey responses * Added a "team building" goals dimension to final survey draft * Open-ended nature of present survey items should already allow for this possibility
Question #2	* OK as is (clear and brief) (2) * Add "team building with staff" as a goals dimension * Liked questions on how ALA learnings are currently being applied; "It's important to apply learnings to behaviors"	* Added a "team building" goals dimension to final survey draft
Question #3	* OK as is; "connects recommendations to goals each participant/team member has set [for him/herself]" (4)	* No changes implied
Question #4	* OK as is; "should yield some good responses for planners" (4) * Start with this item; "it's good to identify the positive elements"	* Decided to retain demographics as first section and keep this item as is

Question #5	* OK as is (4) * Combine questions #3 and #5	* Kept as separate questions (#3 is more specific, while #5 is general)
Other/Miscellaneous Recommendations	* Identify self as an independent evaluator * DON'T include confidentiality clause ("How else can people improve if they are not given direct, open and honest feedback? We do this every day with students in our schools, why not with adults.") * Give assurances of confidentiality (report will not contain names, etc.) * Inform subjects of who will be conducting the follow-ups	* Independent evaluator status prominently highlighted in accompanying cover letter * Confidentiality assurance retained in interests of protection and candor of subjects' responses * Added information identifying self as the follow-up (on-site visitation) evaluator)
Other/Miscellaneous, con't.	* Add a "report card" where respondents are asked to grade each of the five pre-stated goals of the ALA (from mission statement) * Add a dimension regarding what ALA participants hoped to achieve prior to their actual Academy experience	* "Report card" rating item added as survey item * "Hoped-for" goals added as first dimension of all open-ended items

Discussion of Pilot-Test Results

As can be seen from this matrix, not every suggestion is automatically adopted by the survey developer; hence, the last column (researcher action taken). For one thing, this matrix reveals two areas where there were diametrically opposed opinions on the part of the pilot judges. These had to do with the desirability of asking respondents to identify their school districts and the assurances of respondent confidentiality. In the first case, the survey developer chose the "middle ground" of including a district identifier item BUT making it OPTIONAL in nature. In the second, a clear decision had to be made: in this instance, following recommended practice and assuring confidentiality to help protect subjects' anonymity and encourage complete candor in their responses.

In another example of researcher discretion, it was decided not to adopt the recommendation on cultural and language diversities. The survey ended up being considerably lengthened as a result of the various suggestions for added demographic and open-ended items; this was the primary reason. In addition, since a series of on-site follow-up interviews had already been planned with the Director of the ALA, it was felt that this cultural diversity information could be more readily collected as part of the follow-ups.

The final post-pilot draft of the survey appears in Appendix C. The interested reader is referred to Dereshiwsky (1993) for the results of the comprehensive qualitative evaluation of the 1992 Arizona Leadership Academy.

Concluding Comments

As teachers, we know the sense of satisfaction in empowering our students to take responsibility for all phases of their learning experience. Learners of all levels tend to enjoy "doing it all myself" when it comes to their own individual styles, readiness and needs to achieve.

By the same token, teachers can attain the same positive benefits in empowering themselves to trust their own judgments in constructing surveys and tests that are right for them. The preceding example has illustrated how tapping a small number of pre-picked expert judges can result in rich and valuable information for refining a personally developed survey instrument. Such procedures are universally applicable to tests and surveys of virtually any topic area -- and above all, fairly easy to apply. In trusting their expertise regarding what they need to measure, classroom teachers can more effectively take charge of their instructional environments -- and become more greatly empowered professionals themselves in the process.

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Section B: Other Publications and Papers of Related Interest

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Appendix A.

Pilot-Test Cover Letter and Initial Draft of Survey

(DRAFT OF COVER LETTER TO BE MAILED TO PILOT-TEST JUDGES)

(Name, address, date, etc.)

Dear {Name of Recipient}:

I have been designated as the evaluator of the Arizona Leadership Academy which was conducted during Summer 1992. I will be working closely with Dr. David Wayne of the Arizona State Department of Education in this activity.

During the initial phase of this evaluation, we plan to mail an open-ended questionnaire to a sample of participants and program faculty. Our goal is to obtain their opinions, feelings and perceptions as to how the Leadership Academy has impacted important educational outcomes.

You have been selected as an expert judge whose comments on the pilot draft of this survey would be most valuable. Would you please take a few moments to review this questionnaire and to provide feedback to me on the enclosed separate form? Please return your comments to me in the enclosed stamped, self-addressed envelope by {David, please insert ten (10) business days from the date that you issue the letter}. Or if you prefer, you may FAX them to me at the number provided below.

In addition, we hope to follow up this initial survey with interviewing with a select smaller number of schools whose team members participated in the Academy. Our goal in these site visitations is to obtain more in-depth information from participants and their staff on the long-term impact of the Academy. If you would be interested in having your school participate in such on-site interviews, please indicate on the enclosed form.

Your opinions on the initial draft of the Academy evaluation survey will be most valuable. Thank you very much in advance for your assistance. (If you should have any questions, please feel free to contact me directly at the numbers and/or address provided below. I will be back on campus on 8/26/92.)

Sincerely yours,

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(PILOT TEST DRAFT)

INITIAL EVALUATION OF IMPACT OF ARIZONA LEADERSHIP ACADEMY

This survey is intended to obtain your thoughts, feelings and perceptions regarding the impact of the Arizona Leadership Academy on significant educational outcomes. Your comments will be very helpful to us as we look at how the Academy has operated, as well as any ways it can be improved in the future.

Please answer each question below as fully and candidly as possible. If you need additional space, please feel free to use the back of the sheet and/or attach additional sheets of paper, indicating which question (number) is being continued. ALL RESPONSES WILL BE KEPT STRICTLY CONFIDENTIAL. YOUR NAME AND/OR SCHOOL LOCATION WILL NOT BE ATTACHED TO ANY INDIVIDUAL RESPONSES. THEREFORE, THERE ARE NO "RIGHT OR WRONG" ANSWERS. IN EXCHANGE, WE HOPE THAT YOU WILL FEEL FREE TO BE TOTALLY CANDID IN YOUR RESPONSES. Thank you!

Background Information -- Please circle the ONE response that BEST describes you.

1. My role in the Academy was:

   (a) Participant

   (b) Faculty Member

   (c) Program Planner

   (d) Other (please specify)

2. This was my first experience in the Arizona Leadership Academy:

   (a) Yes;

   (b) No.

   IF NO, how long have you been involved in the Academy? (blank line to fill in)

***: NOTE TO JUDGES: Should we ask them to identify their school/district? Or would that be too "threatening" despite the above assurances of complete confidentiality?

JUDGES: Any OTHER demographic info which we should ask??

Evaluation Questions: Please answer each of the following questions as completely and candidly as possible. Please use the back of the page or additional sheets of paper if you need more room.

1. Please identify three (3) goals that you hoped the Arizona Leadership Academy would help you accomplish in EACH of the following areas:

a) in terms of improved student learning outcomes;

b) in terms of your own professional development;

c) other goals (please specify):

2. How are you applying what you learned from the Arizona Leadership Academy with respect to:

a) your goals for improved student learning?

b) your goals for your own professional development?

c) any other goals you identified in 1c, above?

3. How can the Arizona Leadership Academy do a better job in the future of helping its participants meet their:

a) goals for improved student learning?

b) goals for participants' professional development?

b) any other goals?

4. Please identify three (3) things that you would NOT change about the Arizona Leadership Academy (e.g., activities, events) and why:

5. Please identify three (3) things that you think should be changed or improved in the Arizona Leadership Academy in the future, and why:

THANK YOU VERY MUCH for sharing your thoughts and opinions with us!

Appendix B.

Pilot Judges' Worksheet

PILOT JUDGES' COMMENT SHEET

NOTE TO PILOT JUDGES: Please share your thoughts and ideas regarding the initial draft of the enclosed survey. Also please feel free to mark on the survey itself (& don't forget to return it to me if you do).

Your ideas are valuable and will be very helpful to us in revising this survey! Thank you!

Opening comments and instructions to subjects:

Demographic section:

Open-ended question #1:

Open-ended question #2:

Open-ended question #3:

Open-ended question #4:

Open-ended question #5:

***:<u>ANY OTHER</u> SUGGESTIONS????**

I would like for my school to participate in the in-depth on-site future interviews:

(a) No;

(b) Yes.

IF YES, please provide your school's name & address, as well as the name, telephone number and FAX of a contact person:

(lines for name, address, phone, FAX)

THANK YOU AGAIN for your help in revising this draft of the evaluation of the Arizona Leadership Academy!

Appendix C.

Final (Post-Pilot) Draft of Survey

INITIAL EVALUATION OF IMPACT OF ARIZONA LEADERSHIP ACADEMY

This survey is intended to obtain your thoughts, feelings and perceptions regarding the impact of the Arizona Leadership Academy on significant educational outcomes. Your comments will be very helpful to us as we look at how the Academy has operated, as well as any ways it can be improved in the future.

All individual responses will be read, analyzed and summarized by an independent evaluator (Dr. Mary I. Dereshiwsky, Assistant Professor, Educational Leadership & Research, Northern Arizona University) and doctoral student assistants working under her supervision.

Please answer each question below as fully and candidly as possible. If you need additional space, please feel free to use the back of the sheet and/or attach additional sheets of paper, indicating which question (number) is being continued. ALL RESPONSES WILL BE KEPT STRICTLY CONFIDENTIAL. YOUR NAME AND/OR SCHOOL LOCATION WILL NOT BE ATTACHED TO ANY INDIVIDUAL RESPONSES. THEREFORE, THERE ARE NO "RIGHT OR WRONG" ANSWERS. IN EXCHANGE, WE HOPE THAT YOU WILL FEEL FREE TO BE TOTALLY CANDID IN YOUR RESPONSES. Thank you!

I. Background Information -- Please circle the ONE response that BEST describes you.

1. My role in the Academy was:

   (a) Participant - Part of a School Team

   (b) Participant - Leader of a School Team

   (c) Faculty Member/Program Planner

   (d) Other (please specify)

2. My professional affiliation is (PLEASE CIRCLE ALL that apply and STAR your PRIMARY affiliation):

   (a) Teacher;

   (b) Administrator;

   (c) Parent;

   (d) School/District Patron;

   (e) Mental Health Services Provider;

   (f) University Faculty Member;

   (g) School Board Member;

   (h) State Department Staff Member;

   (i) Other (please specify).

3. (if applicable) My school is:

   (a) Elementary level;

   (b) Junior high school level;

   (c) High school level.

4. (if applicable) My school is located in the following area:

   (a) Rural;

   (b) Suburban;

   (c) Urban.

   Current approximate enrollment (students):

5. OPTIONAL: Please identify your district and school:

6. This was my first experience in the Arizona Leadership Academy:

(a) Yes;

(b) No.

IF NO, how long have you been involved in the Academy?

7. (a) The size of my ALA team was:

(b) Total length of time that we have been a team:

II. Rating of Mission Statement: Attached you will find a copy of the ALA Mission Statement and Goals. It would be very helpful to know what specific parts of the program of each week were most helpful and should be kept, modified, etc.)

(a) On the line to the left of each stated goal, please "grade" it on a scale of A - B - C - D - F regarding to what extent the Academy met or exceeded each of these goals. (***: DAVID, IS IT POSSIBLE FOR YOU TO INCLUDE ONE COPY WITH, SAY, A LINE TO THE LEFT OF EACH GOAL FOR THEM TO GRADE IT?)

(b) What specific programs, events, activities, decisions, plans, new relationships, etc., are being carried out in your current professional situation as a result of your involvement in ALA?

(c) In what specific ways are these having an impact (e.g., for students? the community? parents? team? staff? yourself personally? the school as a whole?)

(d) What specific evidence do you have to document and measure this impact (e.g., reports, news articles, announcements, personal testimony, studies, statistics)?

III. Evaluation Questions: Please answer each of the following questions as completely and candidly as possible. Please use the back of the page or additional sheets of paper if you need more room.

1. Please identify three (3) goals that you hoped the Arizona Leadership Academy would help you accomplish in EACH of the following areas:

   a) in terms of improved student learning outcomes;

   b) in terms of your own professional development;

   c) other goals (please specify):

d) Prior to the Academy, you were asked to state a goal that you hoped to achieve. What was this goal?

e) How would you assess the impact of the Academy in helping you to attain this goal (part d, above)?

2. How are you applying what you learned from the Arizona Leadership Academy with respect to:

a) your goals for improved student learning?

b) your goals for your own professional development?

c) team building with your staff?

d) any other goals you identified in 1c, above?

3. How can the Arizona Leadership Academy do a better job in the future of helping its participants meet their:

a) goals for improved student learning?

b) goals for participants' professional development?

c) team building with your staff?

b) any other goals?

4. Please identify three (3) things that you would NOT change about the Arizona Leadership Academy (e.g., activities, events) and why:

5. Please identify three (3) things that you think should be changed or improved in the Arizona Leadership Academy in the future, and how:

The independent evaluator of the Arizona Leadership Academy would like to continue this study with a series of followup visits and interviews to school sites whose staff participated in the Summer 1992 ALA. A series of confidential individual and small-group interviews of administrators, teachers and staff members is planned. The purpose of these visits and interviews is to continue to evaluate the long-range impact of ALA and the extent to which participants (and their peers) are applying what they have learned in their day-to-day educational job duties.

Dr. Dereshiwsky would be happy to answer any questions that you may have about this followup phase of the study. She can be reached as follows:

phone: (602) 523-1892 or -2611 (messages)

FAX: (602) 523-1929

address: Mary I. Dereshiwsky, Ph.D.
Assistant Professor,
Educational Leadership & Research
Center for Excellence in Education
Northern Arizona University
Box 5774
Flagstaff, AZ 86011-5774

I would like for my school to participate in the in-depth on-site future interviews:

(a) No;

(b) Yes.

IF YES, please provide your school's name and address, as well as the name, telephone number and FAX of a contact person:

THANK YOU VERY MUCH for sharing your thoughts and opinions with us!

ARIZONA LEADERSHIP ACADEMY - Advanced Level - June 15-19, 1992

Mission:

To assist school leadership teams in making a positive difference in their schools and communities in order to improve the education of the students of Arizona.

Goals:

_____ 1. Participants will have the opportunity to focus on schools and communities working together to better meet the needs of Arizona students.

_____ 2. Participants will examine the role of professional growth and development for educators and educational trends as related to their school district, their school and their classrooms.

_____ 3. School teams will be encouraged to develop a networking process with school teams from around the state, as well as regionally, in order to support their local efforts.

_____ 4. Participants will focus on the new roles of leadership within schools, including shared decision making and site-based management or decentralized decision making.

_____ 5. Participants and teams will learn and practice facilitation methods which will assist them, and their school colleagues, in successfully developing and implementing school planning and change.

mac604.bjf, 10/92