BTE Evaluation:
Overview, Partner Roles & Responsibilities, and Evaluation Materials

Overview

Johnson & Johnson and FHI 360 are committed to understanding the BTE program's effectiveness and impact on youth, the education system, its local operating companies, and the local community.

Each BTE site works with an assigned "BTE Site Evaluator," which is funded separately by Johnson & Johnson / FHI 360, to conduct an independent evaluation of the local program. Data and information obtained from the site-specific evaluation guide continuous program improvement, build broader community support and awareness, and promote sustainability. Using the data obtained by the BTE Site Evaluator, FHI 360 conducts cross-site analysis to assess broader, global BTE program impacts.

The BTE Site Evaluator uses a standard protocol and series of common data points to track the progress and achievement of each site's short-term, end-of-grant and long-term outcomes, as indicated on the site's Program Model. Data are gathered at "baseline" (within 30 days of BTE program launch) and annually at the end of each "BTE school year" (i.e. at the end of the BTE programmatic Year 1, Year 2, and Year 3) for BTE Participants and a Comparison Group in the following areas:

- **Academic Data** *(BTE Participants and Comparison Group)*, including academic status / grade level, overall Grade Point Average – GPA, Math/Science/Official Language course and grade, total number of school days per year and absences, higher education credits earned – if applicable, and graduation attainment.

- **Student Survey Data** *(BTE Participants and Comparison Group),* including background information (gender, age, participation in non-BTE activities, etc.) and perspectives about skills, abilities, higher education goals, and career interests; site evaluators obtain this data using common pre/post survey instruments.

- **Focus Group Data** *(BTE Participants Only),* including feedback on BTE Program Activities and information about participants' interests/goals; the BTE Site Evaluator obtains this data during facilitated session(s) with BTE participants.

- **J&J Employee Survey** An annual survey is administered to Johnson & Johnson employees working directly with BTE participants.

Partner Roles & Responsibilities

1. **PROGRAM MODEL**
   - **What?** The Program Model is a one-page visual representation of the local BTE program's theory of change (what will be done and what will be changed among a target population). Specifically, the Program Model indicates the Short-Term and End-of-Grant Outcomes, which will be partially used to assess the impact of the BTE program.
   - **Who?**
     - FHI 360 facilitates the strategic planning process and provides the BTE Site Coordinator and the BTE Site Evaluator with Strategic Planning Team's draft Program Model.
     - The BTE Site Evaluator should review and offer comments to the Site Coordinator, which will help the Strategic Planning Team finalize the Program Model prior to completing the BTE Evaluation Agreement.
   - **When?** Finalized during the Strategic Planning Phase.
   - **Tip!** See the BTE Program Model Template.

2. **BTE EVALUATION AGREEMENT**
   - **What?** The Evaluation Agreement outlines the site-specific evaluation protocol, including the total number of BTE participant/comparison group and selection process, timeline, partner contact information, and partner roles/responsibilities.
   - **Who?**
     - FHI 360 will organize an Evaluation Agreement meeting during the Strategic Planning phase with the BTE Site Evaluator, the Site Coordinator, and the School Liaison.
     - FHI 360 leads and facilitates the Evaluation Agreement meeting with all identified BTE partners to complete the agreement. The BTE Site Evaluator then circulates the finalized agreement to all partners.
     - BTE Site Evaluators monitor the agreement, ensuring all partners adhere to assigned roles/responsibilities and update it annually.
     - BTE Site Evaluators notify FHI 360 if there is significant deviation from the timeline outlined in the Evaluation Agreement.
   - **When?** Developed during the Strategic Planning Phase; updated annually.
   - **Tip!** See the BTE Evaluation Agreement Template.

3. **PARENT NOTIFICATION**
   - **What?** The BTE Site Evaluator and/or the secondary school may require that parents of BTE participants and individuals in the comparison group be informed about the evaluation and obtain permission for the BTE Site Evaluator to survey individuals, conduct focus groups, and share raw data / results with all BTE program partners, including FHI 360. If, during the development of the BTE Evaluation Agreement, it is determined that parent notification is required, partners may wish to review the sample "passive consent" letter, which can be modified to meet local needs, that is available on the BTE website. All "opt-out" requests from parents must be honored.
   - **Who?** Distributed by the BTE School Contact, if needed.
   - **When?** Prior to program launch, if specified in the BTE Evaluation Agreement.
   - **Tip!** See the BTE Participant Sample Parent Notification Letter.

4. Record Keeping

- **What?** It is important for the BTE School Contact and BTE Site Coordinator to maintain accurate and up-to-date records of the BTE participants and individuals in the comparison group. It should include:
  - BTE Identification Number. All BTE participants and individuals in the comparison group must have a unique identification number to ensure student confidentiality. This number can be a number previously assigned by the secondary school to all its students at time of enrollment (e.g. the identification number used in the school's academic / attendance data base); alternatively, it can be a uniquely generated number (i.e. 01, 02, 03). During the development of the BTE Evaluation Agreement, the "BTE Identification Number" system to be used is determined by the partners.
  - Cohort Type. For each individual, note the evaluation status as either: 1) BTE Participant or 2) Comparison Group.
  - Program Status. For BTE Participants, note the program status as either: 1) Enrolled / Active Participant, 2) Withdrawn / Left the BTE Program, or 3) Graduated / Completed three-year BTE Program.

  The BTE School Contact develops an initial list of BTE Participants/Comparison Group names with associated BTE Identification Number and Cohort Type. (See Academic Data Template, "Cohort List" spreadsheet.) The BTE School Contact provides the list of BTE Participants with associated identification numbers to the BTE Site Coordinator, who tracks the program status of all participants on the BTE Participant List Template. Any changes to a BTE Participant's program status (i.e. withdraws from the program) should be communicated on an annual basis with the BTE Site Evaluator. (See BTE Participant List Template, "Enrollment," "Year 1," "Year 2," and "Exit-Year 3" spreadsheets.) Note: To maintain student confidentiality, BTE Participant and Comparison Group names should never be shared with the BTE Site Evaluator.
- **Who?** BTE School Contact and BTE Site Coordinator.
- **When?** Prepared prior to program launch; updated annually.

- **Tip!** See the Academic Data Template and the BTE Participant List Template

5. Customization of Common Survey Instruments & Templates

- **What?** FHI 360 developed a series of common evaluation instruments. During the Strategic Planning phase, the BTE Site Evaluator should review the common survey instruments (all versions of the BTE Participant / Comparison Group Surveys) to ensure cultural competence, contextual relevance, and alignment with the Program Model. The BTE Site Evaluator should include the BTE Management Team in this customization process. Specifically, the BTE Site Evaluator:
  - Ensures that questions are culturally competent and contextually relevant; if revisions are necessary, they should be minimal and maintain the integrity of the original question.
  - Adds site-specific references for clarity.
  - Develops additional site-specific questions, if needed, to measure identified End-of-Grant Outcomes, as listed on the Program Model. FHI 360 must approve all site-specific questions prior to distribution. **If site-specific survey questions are proposed, they must be placed at the end of the survey. Do not change the numbering of the original survey.**
  - Translates surveys into native language, if necessary.
  - Ensures that the BTE Master Data Template (Excel spreadsheet) aligns with the surveys, if customized.

CUSTOMIZATION OF COMMON SURVEY INSTRUMENTS & TEMPLATES, CONTINUED

- **Who?** BTE Site Evaluator
- **When?** The BTE Site Evaluator provides FINAL versions of ALL surveys to FHI 360 (if altered or translated) 30 days prior to the anticipated distribution of the "entry /baseline survey."
- **Tip!** See the BTE Site Evaluator Checklist, BTE Participant Surveys (3), Comparison Group Surveys (3), and BTE Master Data Template

6. JOHNSON & JOHNSON EMPLOYEE SURVEY ADMINISTRATION

- **What?** Johnson & Johnson employees volunteering with the BTE program complete an online survey at the end of each program year. FHI 360 provides the online survey link to the BTE Champion; BTE Champions forward the email to all individuals volunteering with the BTE program. FHI 360 provides the BTE Site Evaluator with the site-specific raw data in an Excel spreadsheet on an annual basis for inclusion in the written evaluation reports.
- **Who?** FHI 360 / BTE Champion
- **When?** Annually, at the end of each program year and as specified in the BTE Evaluation Agreement.

7. BTE PARTICIPANT SURVEY ADMINISTRATION

- **What?** The BTE Participant Survey is administered to BTE Participants to gain their perspectives about higher education and careers. The survey requires participants to list their BTE Identification Number, rather than their name; if participants do not know this number the Site Coordinator should provide it. Typically, BTE Participants complete the survey in less than 10 minutes; survey administration should be scheduled in conjunction with the Focus Group(s). The BTE Site Evaluator should work with the Site Coordinator to schedule survey administration.
- **Who?** BTE Site Evaluators. (*Note: should the evaluator not be local, the evaluator may coordinate the survey administration with the school contact*).
- **When?** Specific survey administration dates are listed in the BTE Evaluation Agreement. General guidelines for BTE Participant Survey administration are as follows:
  - BTE Participant Entry Survey. Administered by the BTE Site Evaluator to all BTE Participants prior to, at the first, or in conjunction with a BTE activity.
  - BTE Participant Annual Survey. Administered by the BTE Site Evaluator to all BTE participants prior to the end of program Year 1 and Year 2 in conjunction with the focus groups.
  - BTE Participant Exit Survey. Administered by the BTE Site Evaluator to all BTE participants prior to the end of the Year 3 BTE program. May be in conjunction with the focus groups.
- **Tip!** See BTE Participant Survey and BTE Participant Survey Administration Instructions

8. COMPARISON GROUP SURVEY ADMINISTRATION

- **What?** The Comparison Group Survey is administered to individuals in the comparison group to gain their perspectives about higher education and careers; responses are compared to those of the BTE Participants. Typically, individuals can complete the survey in less than 10 minutes. The survey requires participants to list their "Identification Number," rather than their name; if participants do not know this number the BTE School Contact can provide it.
- **Who?** BTE School Contact

Comparison Group Survey Administration, continued

- **When?** Specific survey administration dates are listed in the BTE Evaluation Agreement. General guidelines are as follows:
  - The BTE Site Evaluator provides the required number of Comparison Group Surveys (hard copies) to the BTE School Contact on an annual basis, at least 30 days prior to distribution.
  - Comparison Group Baseline Survey. Administered by the BTE School Contact to the comparison group at baseline (within 30 days of the start of the school year).
  - Comparison Group Annual Survey. Administered by the BTE School Contact to the comparison group at the end of the school year (i.e. the end of the BTE programmatic Year 1 and Year 2).
  - Comparison Group Exit Survey. Administered by the BTE School Contact to the comparison group at the end of the BTE program (i.e. BTE programmatic Year 3, prior to the end of the school year).
  - The BTE School Contact collects and mails original copies of all completed surveys to the BTE Site Evaluator immediately following completion.
- **Tip!** See Comparison Group Survey(s) and Comparison Group Survey Administration Instructions

9. BTE Participant Focus Groups

- **What?** Focus groups enable BTE Participants to offer feedback on BTE Program Activities and information about participants' interests/goals. The BTE Site Evaluator obtains this information during annual facilitated discussion sessions with BTE Participants. Each focus group is 60 minutes in length with 10-12 BTE Participants. Focus groups may be held in conjunction with the 10-minute BTE Participant Survey administration. BTE Site Evaluators should hold focus groups at the end of the BTE programmatic Year 1, Year 2 and Year 3 (preferably at the end of the school year or shortly after the last BTE activity of the year). The BTE Site Evaluator works with the Site Coordinator to determine the specific logistics for the focus groups, including the date, time, location, duration, number of participants per focus group, and total number of focus groups required.
- **Who?** BTE Site Evaluator
- **When?** Annually; prior to the end of each program year. Specific Focus Group dates are listed in the BTE Evaluation Agreement.
- **Tip.** See the Focus Group Question Guide

10. Academic Data Collection

- **What?** The secondary school must provide the following Academic Data for BTE Participants and individuals in the Comparison Group to the BTE Site Evaluator. Specifically:
  - Baseline Academic Data *(data from the previous school year)*, including the grade level, overall Grade Point Average (GPA), Math/Science/Official Language course name and grade, total number of courses taken, total school days, and total days absent.
  - Annual Academic Data, including grade level, overall Grade Point Average (GPA), Math/Science/Official Language course name and grade, total school days, total days absent, and expected graduation date.

  The BTE School Contact must enter all data into the Academic Data Template (Excel Spreadsheet) that is provided by the BTE Site Evaluator.

Academic Data Collection, continued

- **Who?** BTE School Contact
- **When?** Specific due dates are listed in the BTE Evaluation Agreement. General guidelines are as follows:
  - The BTE Site Evaluator provides the Academic Data Template (Excel spreadsheet) and Academic Data Template Instructions to the BTE School Contact a minimum of 30 days prior to program launch (baseline) and prior to the end of each school year.
  - The BTE Site Evaluator will work directly with the BTE School Contact to review requirements and support the completion of the Academic Data Template, as needed.
  - The BTE School Contact provides:
    - Baseline Academic Data within 30 days of the start of the school year
    - Annual Academic Data within 30 days of the last day of each school year (i.e. at the end of the BTE programmatic Year 1 Year 2 and Year 3).
- **Tip.** See the Academic Data Template and Academic Data Template Instructions

11. Data Analysis

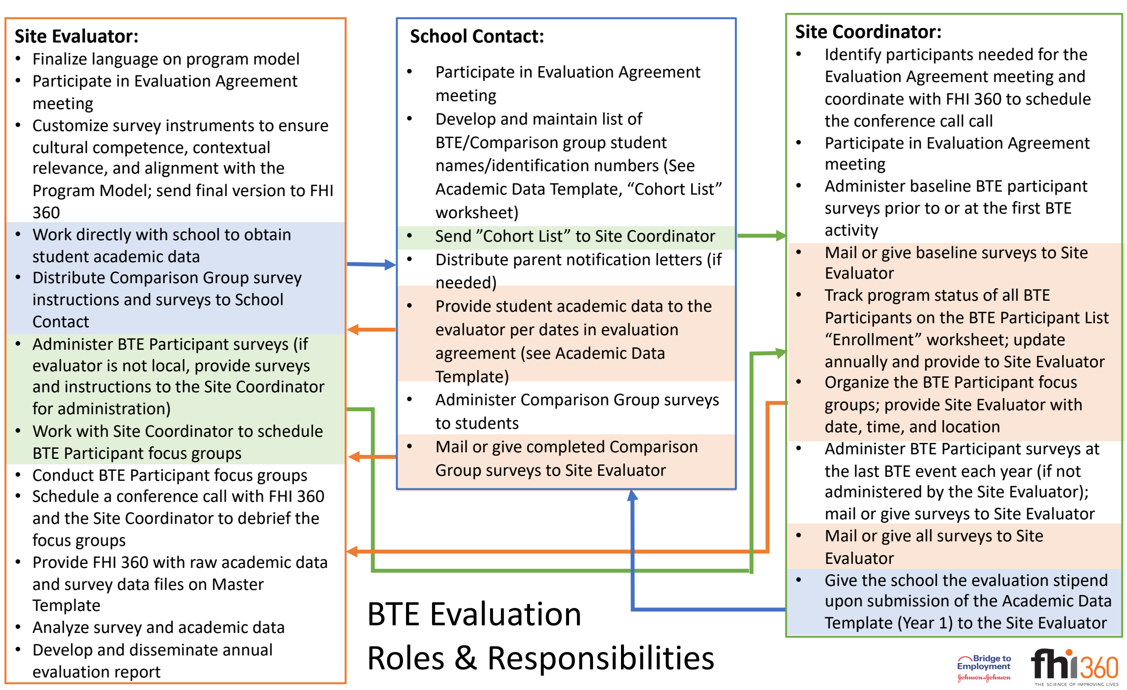
- **What?** Analysis of all collected data. Note: The BTE Site Evaluator should enter all survey responses and academic data by BTE Identification Number into the BTE Master Template.
- **Who?** BTE Site Evaluator
- **When?** Annually
- **Tip.** See BTE Master Template and BTE Master Template Instructions for more information.

12. Deliverables & Reporting

- **What?** Data and findings are reported on an annual basis to FHI 360 and the local BTE partnership. Specifically:
  - Raw Data. The BTE Site Evaluator submits all survey and academic data to FHI 360 in the BTE Master Template (Excel spreadsheet).
  - Focus Group Debriefing. The BTE Site Evaluator holds a short conference call with the Site Coordinator and FHI 360 (at a minimum) immediately following the focus groups to discuss key findings, prompting quick action and Work Plan revisions, if necessary, to improve the BTE program.
  - Annual Evaluation Report. The BTE Site Evaluator prepares an annual written report detailing the site-specific findings and distributes it to FHI 360, the BTE Champion, and Site Coordinator (at a minimum).
  - Annual Evaluation Meeting. The BTE Site Evaluator formally presents the evaluation data to the BTE Advisory Committee and BTE Management Team. If FHI 360 does not participate in this meeting, the BTE Site Evaluator holds a brief conference call with FHI 360 staff to review data and findings. The BTE Site Evaluator works with the Site Coordinator to schedule a convenient time for this annual meeting.
- **Who?** BTE Site Evaluator

Deliverables & Reporting, continued

- **When?** Specific due dates are listed in the BTE Evaluation Agreement. Generally, the BTE Site Evaluator provides:
  - Baseline Raw Data in the BTE Master Template to FHI 360 within 45 days of program start.
  - Annual Raw Data in the BTE Master Template to FHI 360, annually and within 45 days of the end of the school year (i.e. end of BTE programmatic Year 1 and Year 2).
  - End-of-Program Raw Data in the BTE Master Template to FHI 360 within 45 days of the end of the BTE program (i.e. programmatic Year 3 at the end of the school year).
  - Focus Group Debriefing immediately (no more than 2 weeks) following the focus groups; annually (i.e. end of BTE programmatic Year 1, Year 2, and Year 3).
  - Annual Evaluation Report annually within 60-days of receipt of academic data and survey data (i.e. end of BTE programmatic Year 1, Year 2, and Year 3).
  - Annual Evaluation Meeting annually – shortly after the distribution of the written Annual Evaluation Report.
- **Tip.** See the BTE Master Template, BTE Master Template Instructions, and Annual Report Guidelines for more information on data analysis, format, and content of the written report.



Evaluation Materials

A variety of materials are available on the BTE Website (www.bridge2employment.org) to support the independent evaluation:

- **Background Information & Instructions**
  - BTE Overview
  - BTE Program Design & Protocols
  - BTE Evaluation Overview, Partner Roles & Responsibilities, and Evaluation Materials
  - BTE Site Evaluator Checklist
  - BTE Participant List Instructions
  - Academic Data Template Instructions
  - BTE Survey Administration Instructions
  - BTE Master Data Template Instructions

- **Forms & Templates.** Standard forms and Excel spreadsheets to facilitate the implementation and data collection processes. They include:
  - BTE Evaluation Agreement Template
  - Sample Parent Notification Letters
  - BTE Participant List Template
  - Academic Data Template
  - BTE Master Data Template

- **Common Survey Instruments.** FHI 360 developed a series of common evaluation instruments:

  BTE Participant Surveys
  - BTE Participant Entry Survey
  - BTE Participant Annual Survey
  - BTE Participant Exit Survey
  - BTE Survey Administration Instructions

  Comparison Group Surveys
  - BTE Comparison Group Baseline Survey
  - BTE Comparison Group Annual Survey
  - BTE Comparison Group Exit Survey
  - BTE Survey Administration Instructions

  Other Surveys
  - Johnson & Johnson Employee Survey

- **Focus Group Materials.** FHI 360 developed a series of common focus group questions:
  - Focus Group Question Guide

- **Reporting Materials.** Reporting and data analysis guidelines:
  - Annual Evaluation Report Guidelines