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Family Members as Evaluators: Preliminary Results of a Training Curriculum

INTRODUCTION

With the inception of the Child and Adolescent Service System Program (CASSP) sponsored in 1984 by the National Institute of Mental Health (NIMH), the relationship between families with children who have serious emotional challenges and professionals who work with them has shifted slowly, but dramatically. This shift was prompted by the CASSP initiative's tenet encouraging the inclusion of families as partners in the planning, implementation, and evaluations of their programs and service systems.

This shift toward parent-professional partnerships has resulted in researchers and family members sharing responsibility for evaluating their programs and systems, requiring more knowledge and skills about research and evaluation than family members typically have. The inherent power imbalance could render family members nominal tokens in these partnerships. In order for family members to be significant contributors to the evaluation process, they need skills, knowledge, and information about evaluation methodology. As Mertens, Fareley, Madison and Singelton (1994, p.126) put it, training family members enables them to "take the leadership in social change."

Recognizing the potential of evaluation as a tool for families involved in systems change and the new opportunities afforded by the increased emphasis on involving families in systems evaluation, the Federation of Families for Children's Mental Health developed an evaluation training curriculum for families. The first of three courses was conceptualized as a primer on how to understand and interpret evaluation processes and how to use the results to support change.

Co-taught by a family member and an evaluator, this collaborative training model emanated from a value base that recognizes the expertise of both families and evaluators, and the benefits of working together. The goal of the collaborative efforts, taken as whole, is to create a new and distinct way for addressing challenges in the children’s mental health service system and of understanding the experiences of those refining and providing services. This new role for families in evaluation is intended to give families the skills and knowledge needed to participate effectively in any part of the evaluation process.

Our presentation discussed the preliminary results of two related studies. The first is the evaluation of the curriculum “How To Understand Evaluation,” developed by the Federation of Families for family members of children with mental health needs. The purpose of this evaluation is twofold: first, to assess the effectiveness of the training curriculum; and second, to engage workshop participants in evaluation. In addition, this paper also discusses preliminary findings of an evaluator study conducted for the purpose of identifying strategies that promote collaborative relationships in evaluation teams.

METHOD

In order to evaluate the effectiveness of the curriculum “The World of Evaluation: How To Understand It” (Course 1) we wanted to know:

1. How participants rate the amount learned about key topics presented;
2. Whether participants perceived changes in their ability to advocate;
3. Whether participants perceived changes in their attitudes about working with evaluators;
4. Whether participants perceived changes in their confidence about asking questions and voicing opinions about evaluation.

Operating under the premise that “evaluation should serve the needs of program consumers” (Greene, 1997, p. 27), staff from the Federation of Families were full partners throughout development of the

questionnaire and data collection process. We developed a 14-item questionnaire (see Table 1). The quantitative measures asked participants to rate changes in specific skills and attitudinal changes on a Likert-type scale (1 = little or nothing, 3 = some things, 5 = a lot). Qualitative items probed for specific examples related to the perceived changes as well as the perceived value the training held for participants.

Table 1. Sample Questionnaire Items

Item type	Item
Quantitative	On a scale from 1 to 5, how would you rate the amount you learned about the evaluation process?
Qualitative	As a result of the training, how has your attitude about working with evaluators or evaluators changed?
Probe	Tell me about some of the things you learned and how you’ve used them.

Participants from 2 different workshop presentations of the first course, “The World of Evaluation: How to Understand It” were interviewed. These workshops were held over 2½ days and covered topics such as the purpose of evaluation, stages in the evaluation process, understanding evaluation reports and articles, and the important role of evaluation in advocacy. Collaboration was modeled by the use of co-facilitators, a family member and an evaluator. The trainings were interactive and multi-method, using adult learning principles.

Sixty to ninety days after the trainings participants were sent a letter by the Federation of Families describing the evaluation of the training. This letter included a consent form they could sign and send back to the Research and Training Center on Family Support and Children’s Mental Health at Portland State University, whose staff conducted the interviews. Twenty-four

of the 40 participants returned the consent forms and were contacted for a telephone interview. The 16 participants who did not respond either failed to mail in the consent form or responded after the interviews were completed. The interviews lasted about 30 minutes each. The qualitative and quantitative items were coded and analyzed.

Part two of this study consisted of interviewing evaluators to ask them about their experiences of working with family members. A telephone survey was designed to enhance understanding of the challenges facing evaluators and family members working together. The survey was also designed to identify the most effective strategies for partnerships between family members and evaluators. Evaluators who have worked with family members on evaluation teams at System of Care grant communities were identified through expert nomination and a snowball sampling process. To date, 9 evaluators have participated in one approximately one-hour telephone semi-structured interview, with open-ended questions.

The interview focused on

- ◆ the evaluator's experience working with family members on evaluation teams,
- ◆ the roles of family members on evaluation teams,
- ◆ the institutional barriers and other challenges in working with family members,
- ◆ effective strategies for working with family members, and
- ◆ recommendations for training evaluators to better prepare them for working with family members.

Evaluators who are (or have been) working with family members on evaluation teams were interviewed by telephone using open-ended qualitative questions. These interviews were transcribed and analyzed for themes.

RESULTS AND DISCUSSION

Preliminary results of a training curriculum

Preliminary results of the evaluation of workshop participants showed that

- ◆ Sixty-seven percent of the participants rated the amount they learned about the evaluation process a 4 or 5, with 42% rating it a lot.
- ◆ Eighty-three percent of the participants reported that it had affected their ability to advocate. The qualitative answers indicate this was a positive change.
- ◆ Forty-five percent of the participants reported that the training changed their confidence level "a lot."
- ◆ Sixty-two percent of the participants rated their change in attitude of working with researchers a 4 (33%) or 5 (29%), indicating high levels of attitude change. The qualitative answers indicate this was a positive change.

A preliminary analysis of the qualitative data revealed themes from participants supporting the quantitative data. These themes, which are paraphrased statements from interviewees, are listed below.

Amount learned about the evaluation process

- ◆ They learned that evaluation should be driving a lot of things being done—it's important. They were surprised at how useful it is.
- ◆ They learned how to look at articles and to get the important information out of them and to judge the value of the information.
- ◆ They learned how to effectively create charts for different audiences.
- ◆ They learned how to ask questions and how evaluation relates to family members.

Effect on ability to advocate

- ◆ They learned how to use evaluation data as a tool to empower families to be able to advocate for programs with politicians.
- ◆ They learned how to voice opinions about decisions that are being made. They know where to get information they need, and to use that information (for example, going to the state Capitol and speaking to state representatives).

- ◆ They learned how to review evaluation reports and advocate for more services when needed or less services where services aren't helpful for families.
- ◆ They learned the importance of evaluation for advocacy, and that providers and researchers value what they say more.

Change in confidence in voicing opinions about evaluation

- ◆ Parents don't need to feel intimidated. The training made evaluation easy to understand.
- ◆ Evaluation may look daunting or scary but it can be taken piece by piece and understood—you don't have to be a Ph.D. or research scientist.
- ◆ They feel that they have more power and that they're at the table with everyone else.
- ◆ They possess a greater level of confidence when talking to evaluators at the evaluators' level and are able to read and understand reports and use them to their advantage.
- ◆ They can now talk boldly and ask questions.

Change in attitude about working with researchers or evaluators

- ◆ They are much more excited about working with evaluators.
- ◆ They didn't realize that family members need to start working with researchers.
- ◆ Evaluators seem more human and less intimidating—not just working with numbers and figures.
- ◆ They have become more vocal with evaluators.

During the course of the training, family members requested further opportunities to build their capacities in evaluation. They expressed their desire to put into practice the concepts and skills they learned by direct involvement in the analysis of data from this study. Including the workshop participants in the analysis was consistent with the collaborative nature

of the evaluation and offered additional perspective in the interpretation of the data.

Therefore, family members who expressed interest in participating were given full access to the qualitative and quantitative data (absent identifying information). They were mailed preliminary quantitative analyses of the data, narrative responses to open-ended questions, a tip sheet outlining steps in the qualitative analysis process, and highlighting pens. Two conference calls were held to discuss themes. In total, 7 family members participated in the calls. Participants noted similar themes as the evaluators, however, they selected different examples illustrating these themes.

In summary, initial findings from the evaluation of Course One reveal that participants acquired knowledge and skills integral to evaluation research and gained confidence in working in evaluation and using it for advocacy. The training offers family members a foundational knowledge in the evaluation process and the beginning skills that can help them become valuable members of evaluation teams.

Preliminary findings of evaluator survey

Preliminary findings were also presented from a study of evaluators' experiences working with family members on evaluation teams. Nine interviews with evaluators who have worked with family members have been completed to date. Preliminary qualitative analysis of these interviews revealed common themes:

- ◆ These evaluators were not prepared by their professional training to work with family members.
- ◆ Most of these evaluators learned skills in partnering with family members by trial and error.
- ◆ There were several common institutional barriers to employing family members on evaluation teams, such as hiring family members who did not have degrees, offering low salaries, and assuring timely reimbursement of travel and other employment related expenses.
- ◆ Other challenges included assisting family members to gain the technical skills needed for the job, providing support to deal with the stresses

of the job, and supporting family members to gain respect from agency and community partners.

- ◆ Despite these challenges, family members were highly valued by the evaluators for the important contributions they made to the evaluation team.
- ◆ Effective strategies for partnering with parents included advocacy in hiring decisions and for adequate salaries, anticipating needs for technical skills and providing access to training opportunities, and nurturing a work culture of support and open communication.
- ◆ Evaluators recommended educational and training materials related to working with families, including conference presentations, online listserves, journal articles, and opportunities for contact with other evaluators to share ideas about effective strategies.

More interviews are planned for this study and further analysis and reporting continue. There is a need for training materials that will be relevant and useful to evaluators as they continue to develop valuable partnerships with family members. The presentation concluded with discussion with conference participants about the training issues related to family involvement in evaluation.

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