

APPENDIX D

Description of MSP-PE's Site Visit Procedures, Site Visit Training, and Structure of the Site Visit Report

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I. MSP-PE's SITE VISIT PROCEDURES

I A. Illustrative Site Visit Routine (3 visitors for 3 days)

	Average Burden (in Hours) for each Type of Interviewee*			
	<u>PI</u>	<u>PC</u>	<u>P</u>	<u>PE</u>
<u>Day 1</u>				
<u>early a.m.</u> or <u>night before</u>: travel				
ALL THREE VISITORS:				
<u>12:30-3:30p.m.</u> (with working lunch):				
-principal investigator (PI) and project coordinator (PC) (2 interviewees X 3 hrs. each)				
	3	3		
<u>3:30-5:30p.m.</u>				
-partnership evaluator (PE) (1 interviewee X 2 hrs.)				
				2
<u>Day 2</u>				
SITE VISITORS 1 AND 3:				
<u>8:00-10:00a.m.</u>				
-team reviews and copies retrieved documents and qualitative and quantitative data from Day 1				
<u>10:00a.m.-1:00p.m.</u>				
-principal investigator (PI), project coordinator (PC), and partnership evaluator (PE) jointly clarify partnership's experiences and data (3 interviewees X 3 hrs. each)				
	3	3		3
<u>2:00-5:00p.m.</u>				
-partnership evaluator (PE) review of selected evidence-based data collection activities (1 interviewee X 3 hrs.)				
				3
SITE VISITOR 2 (can rotate with Site Visitor 1):				
<u>8:00a.m.-12:00</u>				
-separate interviews of first set of four partners (P) (4 interviewees X 1 hr. each)				
				4
<u>1:00-5:00p.m.</u>				
-separate interviews of second set of four partners (P) (4 interviewees X 1 hr. each)				
				4
<u>Day 3</u>				
<u>8:00-11:00a.m.</u>				
-team reviews and copies retrieved documents and qualitative and quantitative data from Day 1, also preparing for final interviews				
<u>11:00a.m.-12:00</u>				
-principal investigator (PI) and project coordinator (PC) (2 interviewees X 1 hr. each)				
	1	1		
<u>p.m.</u> : travel				

* PI = principal investigator; PC = project coordinator; P = partner; and PE = partnership evaluator

I B. Cross-Walk Between People to be Interviewed and Topics in the Site Visit Instruments

Questions	(1) MSP Principal Investigator	(2) MSP Project Coordinator	(3) MSP Evaluator	(4) MSP Partner (n=8)
A1	Day 1	Day 1	Day 1	Day 2
A2	Day 1	Day 1	Day 1	Day 2
A3	Day 1	Day 1	Day 1	SKIP
A4	Day 1	Day 1	Day 1	Day 2
A5	Day 1	Day 1	Day 1	Day 2
B1	Day 1	Day 1	Day 2b	SKIP
B2	SKIP	SKIP	Day 2b	SKIP
B3	Day 1	Day 1	Day 2b	SKIP
C1	Day 2a	Day 2a	Day 2a	SKIP
C2	Day 2a	Day 2a	Day 2a	SKIP
D1	Day 2a	Day 2a	Day 2a	SKIP
D2	Day 2a	Day 2a	Day 2a	SKIP
E1	Day 2a	Day 2a	Day 2a	SKIP
E2	Day 2a	Day 2a	Day 2a	SKIP
F1	Day 3	Day 3	Day 2b	Day 2
F2	Day 3	Day 3	Day 2b	Day 2

Day 2a: Interviews held together

Day 2b: Project evaluator interview held separately

II. MSP-PE's SITE VISIT TRAINING

II A. INTRODUCTION TO THE SITE VISIT INSTRUMENTS

The MSP-PE site visit instruments contain a set of questions directed to the site visit team, not any given interviewee. The team is to keep these questions—or line of inquiry—in mind, while collecting converging evidence from multiple sources (e.g., discussions with key MSP members, review of MSP documents and data, and direct field observations), accessed during a site visit. The *team's* answers are then to form the basis for its site visit report.

Related Information about the MSPs. The MSP-PE's site visits are but one source of data available about the MSPs. Other major sources include: 1) the MSP-MIS; 2) MSP grant reports; and 3) MSP-produced evaluation or research reports. Site visit teams will review these other sources thoroughly, prior to conducting a site visit.

At the same time, the information in these other sources needs to be recognized as “self-reported.” In this sense, any reported accomplishments may in fact be considered “claims.” To this extent, the site visit instruments require the site visit team to ask corroboratory questions, including efforts to collect copies of the MSPs' own instruments and data on various key topics.

Specializations of Site Visit Members. Team members assembled for any given site visit will cover as many specialties as possible (e.g., curriculum, instruction, or professional development; evaluation; equity of educational outcomes; partnerships; or science and engineering careers). In addition, all team members will participate in MSP-PE specific training and orientation.

II B. SITE VISIT PREPARATION

Prior to making site visits, all team members will consult and assimilate the following materials:

1. For collecting and documenting information from multiple sources of evidence, see Yin, *Case Study Research: Design and Methods*, 2009, Chapter 4.
2. For an overall orientation to field-based evaluations, see U.S. General Accounting Office, *Case Study Evaluations*, Washington, DC, Nov. 1990, Transfer Paper 10.1.9.
3. For information on the specific MSP site to be visited, read the latest annual grant and evaluation reports and other readily available papers by the MSP (e.g., papers prepared for NSF's MSP Learning Network conferences).

Training. Prior to the onset of any of the site visits, members will participate in an initial training session, covering the site visit protocol and general evaluation methods.

Orientation. One week prior to every site visit, team members will hold a meeting (e.g., a conference call) to discuss the objectives for the forthcoming site visit and identify the topics likely to be covered by the site visit. The orientation should be preceded by members having reviewed the existing documents about the specific MSP (see #3 above).

II C. DIVISION OF WORK AMONG SITE VISIT MEMBERS

At the outset of each site visit, each site visit team will assign its individual members to the following specific roles, functions, and responsibilities.

Each site visit member will be formally responsible for covering specific portions of the site visit instruments. The responsibility includes making sure that the relevant data have been addressed and collected, and later composing that portion of the site visit team's report. In a rotating manner, the other members of the site visit team will support the "lead" member in each of these portions, by: 1) carrying out the needed fieldwork; 2) providing notes and other materials to the lead member to support the analysis and writing; and 3) reviewing the draft portion and providing feedback on the draft.

All members of the team will contribute to the draft report. The team also will assign one of its members to coordinate and lead the report drafting. This person's main objective will be to assure the integrity of the report as a whole, eliminating redundancies and resolving disagreements that might arise because different portions will have been written by different team members.

III. STRUCTURE OF THE SITE VISIT REPORT

The site visit report will be a narrative (with tables and exhibits, where relevant) organized according to the six main sections of the site visit instruments: A) partnerships, B) evidence-based design and outcomes, C) teacher quality, quantity, and diversity, D) challenging courses and curricula, E) role of the IHE disciplinary faculty, and F) rival explanations. Within each section, the narrative should follow the sequence of numbered interview questions (A1, A2, A3, etc.), bringing together the responses from the different interviewees under the same question number and hence also discussing the consistencies and inconsistencies across the interviewees.

At the end of the report should be listed alphabetically, in separate sections, the full citations of any documents used and the persons (name, title, place, and date) interviewed to complete the site visit report. Footnotes in the narrative should cite the items in these two lists by coded number, to show the source(s) of the information in the narrative. The coded numbers should be assigned to the sources randomly, cutting across both documents and interviewees, but the decoding of the numbers should not be part of the report. Rather, the decoding information will be kept in secure project files, to be available only to the author of the site visit report and the project director of the national evaluation. This coding procedure therefore retains the anonymity and confidentiality of the original interviewees.

If an MSP's tables and exhibits are part of the report, these materials should not be re-composed or re-formatted in any way. The materials should be presented in their original form (e.g., as a PDF copy), with citations added to identify their source. The creation of new exhibits, figures, and tables by the site visit team itself is welcome but should not be considered a requirement and should be resisted if leading to any delay in completing the narrative report.

The team should write the narrative in plain English: limited jargon, active (not passive) voice, third (not first or second) person, and simple (not compound) sentences. For instance, simple sentences do not usually contain relative pronouns. The writing also should follow a glossary of MSP-specific terms and acronyms, to be shared ahead of time with the evaluation team.