Guidelines for the Scholarship of Engagement

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The following guidelines were developed to serve as a supplemental resource for university faculty who conduct engagement activities through their respective department, center, institute, college, and/or unit at the university. These guidelines will aid faculty in reporting their engaged teaching, research, and service scholarship efforts through planned community-engaged programs for adult and youth audiences.

These guidelines will also aid the faculty in documenting the scholarship of engagement in their annual faculty evaluations, promotion and tenure applications, award/recognition applications, professional vitas, featured publications, unit reports, media announcements, etc. It will also support Department and Center Heads in conducting annual faculty evaluations and reviewing promotion and tenure applications. The objectives of this document are to:

- Explain the Land-Grant university's mission regarding engagement in identifying adult and youth learners' needs and meeting those needs through community-engaged teaching, scholarship, and service.
- Define and support the faculty scholarship of engagement in the context of teaching by providing voluntary, nonformal instruction to adult and youth audiences.
- Support the work of department/school, college, and university promotion and tenure committees tasked with evaluating faculty in engaged research and service.

The Land-Grant's Engagement Mission

Public engagement in higher education seeks to connect individuals, groups, communities, and businesses to solve societal problems and enhance the quality of life through collaborative partnerships between our faculty, staff, students, and the citizens of our state, nation, and world. Our engagement scholarship involves extending the university's knowledge, offerings, and influence on communities and businesses for the betterment of people. Faculty engagement efforts include providing nonformal and formal learning opportunities, technology transfer, research, and service that will ultimately lead to behavior changes, research-proven findings, and supporting services.

The scholarship of engagement is the integration of academic scholarship and community engagement. Land-Grant universities have a responsibility to work with individuals, communities, stakeholder groups, and business and industry to provide university knowledge and resources to help build community capacity through teaching, research, and service.

It is important to distinguish outreach from engagement. Outreach includes one-way communication where university faculty and staff provide information about an issue, problem, or opportunity; this is typically described as public service. Engagement involves two-way communication and a deliberate, well-planned process where university faculty and staff inform, involve, and engage the community or business. Engagement typically occurs through community-engaged research, formal (credit) teaching, and nonformal (noncredit) teaching.

Land-Grant universities have always sought to enhance their engagement efforts with students/clients, groups, communities, and businesses around the world to help them improve and increase their quality of life. These institutions have a remarkable track record of doing so in the past and present. Land-Grants are committed to engagement, community collaboration, and excellent communication with our constituencies for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity.

Students/clients of institutions of higher learning are changing, and they have greater needs, with a demand to reach them over time and distance using the most advanced technology. Access to public education has new dimensions. Students/clients will change occupations and positions several times during their lifetime, and the cost of formal education is becoming more expensive.

Educational institutions are continuously assessing how we can better serve the changing educational needs of students/clients regardless of their socio-economic class, race, gender, location, or occupation. This assessment includes how faculty can better reach those individuals who cannot attend and/or afford formal courses.

Obviously, this work can be an enhanced coordinated effort, with reciprocal public relationships that actively engage more partners and constituents. It will also require faculty and staff to deliver more coordinated formal (credit) and nonformal (noncredit) educational programs to clientele globally identified through the outreach and engagement process. Enhancing community engagement efforts will provide greater learning opportunities in teaching and research scholarship in nontraditional settings, such as our communities and businesses.

Ernest Boyer served as the United States Commissioner of Education, the Chancellor of State University of New York, and the President of the *Carnegie Foundation for the Advancement of Teaching* during his career. Boyer had a huge impact on higher education, and he was an expert in teaching methods and programs. He is primarily responsible for igniting the outreach and engagement discussion in higher education.

Boyer (1996) said that “the academy must become a more vigorous partner in the search for answers to our most pressing social, civic, economic, and moral problems, and must affirm its historic commitment to what I call the scholarship of engagement” (pp. 19-20). However, Boyer’s view of engagement was more than contacting a community group to assess needs or serving on a board or commission to provide expertise. His view of outreach and engagement involved scholarship through research (discovery) and teaching, providing knowledge through instruction (integrating and sharing knowledge), and helping people apply the knowledge (become practitioners).

The Faculty's Scholarship of Engagement

The *Carnegie Foundation for the Advancement of Teaching* definition of community engagement as "collaboration between institutions of higher education and their larger communities (local, regional/state, national, and global) for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity. The purpose of community engagement is the partnership of college and university knowledge and resources with those of the public and private sectors to enrich scholarship, research, and creative activity; enhance curriculum, teaching, and learning; prepare educated, engaged citizens; strengthen democratic values and civic responsibility; address critical societal issues; and contribute to the public good" (https://public-purpose.org/initiatives/carnegie-elective-classifications/community-engagement-classification-u-s/).

Boyer's work, the works of other scholars, and the spirited engagement discussion in higher education prompted Land-Grant universities to think about their historic mission and vision for the future. The discussion brought about the Kellogg Commission on the Future of State and Land-Grant Universities (1999) report. As we know, Land-Grant universities have left an indelible mark on higher education nationally and internationally. From the founding of Land-Grant institutions, one focus has been providing better access to higher education formally and non-formally. This focus and the corresponding results have led to being referred to as "the People's University." While Land-Grant universities have provided outstanding formal education programs to millions of undergraduate and graduate students, a large part of our impact has been through outreach and engagement efforts that provided nonformal (noncredit) instruction/teaching to individuals, families, communities, and business and industry owners and employees who have been unable to attend a formal classroom setting for an accredited degree program.

Many of the scholars in academia driving the engagement debate are from private and non-Land-Grant institutions. However, Land-Grant faculty and administrators realized quickly that the basic Land-Grant model already encompasses outreach and engagement through federal and state mandates to carry out our mission:

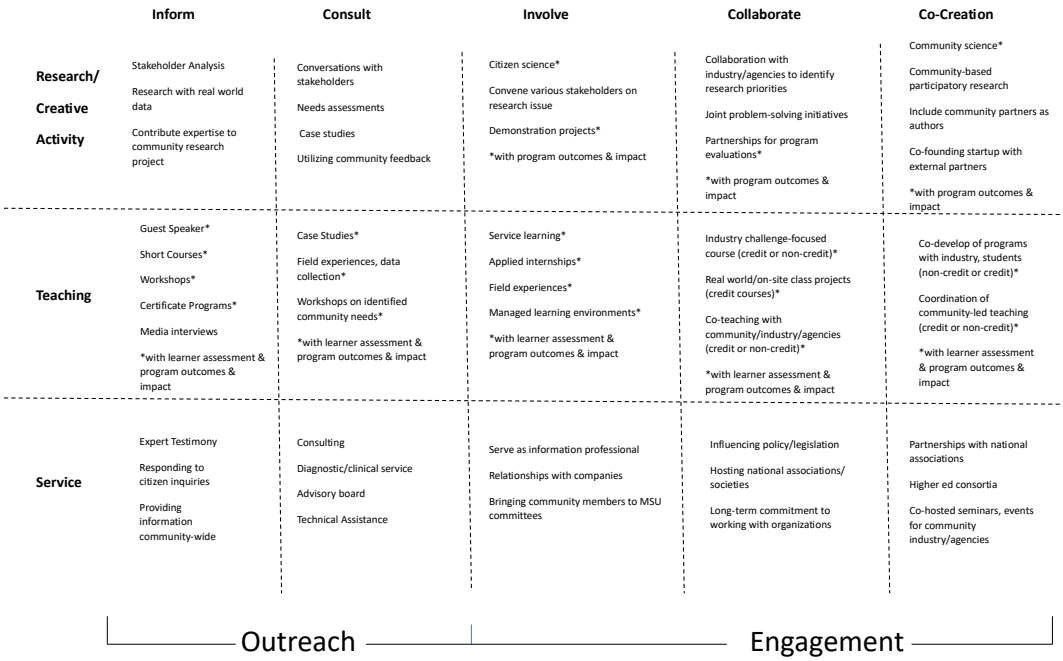
- Involve local people, groups, and communities in identifying their educational needs,
- Determine and utilize the existing knowledge to address the assessed needs,
- Develop knowledge when existing knowledge is inadequate, and
- Extend or deliver knowledge and information to local people and user groups at a time and place advantageous to them.

Mississippi State University (MSU) has developed an *Engagement Plan* that provides a university-wide system to support the faculty, staff, students, and external partners with planning, developing, and implementing engaged teaching (for credit/noncredit courses and programs), engaged research, and engaged service that will apply to the annual faculty review form and promotion and tenure (p & t) application.

MSU's engagement strategy is based on the following *Continuum of Engaged Scholarship Model* (adapted and modified from Colorado State University, 2021) for engaged teaching, research, and service to support the engagement work and assessment of our faculty, staff, students, and external partners. See the figure below.

Continuum of Engaged Scholarship – The How

(modified from Colorado State University, 2021)



Scholarship "is creative intellectual work that is validated by peers and communicated" (Weiser & Houglum, 1998) to the larger world. Scholarship includes, but is not limited to, obtaining grants, conducting research, writing scholarly publications, delivering presentations, creating curricula, creating art, and producing artistic performances (https://www.ccel.msstate.edu/about/whatis/).

Scholarship of Engagement is scholarship resulting from the collaborative and mutually beneficial partnership between university member(s) (i.e., faculty, staff, and/or student) and external non-higher education partner(s). Engaged scholarship is typically created and communicated through any of the following activities: discovery of new knowledge, development of new knowledge, dissemination of new knowledge, change in learning, change in behavior, and/or change in conditions (Franz, 2009; https://www.ccel.msstate.edu/about/whatis/).

As shown in the figure above, the *Continuum of Engaged Scholarship* distinguishes engagement activities from outreach activities. Outreach refers to informing and consulting efforts, while engagement includes involving, collaborating, and co-creating efforts with community members or organizations. Thus, moving beyond outreach to “engagement” requires authentic involvement with external partners outside the university. This means that the faculty’s scholarship of engagement is much more than public and professional service, such as serving as a volunteer for a local community-based project or, as in the case of many faculty, serving on a board or commission to provide expertise. Boyer said that “the academy must become a more vigorous partner in the search for answers to our most pressing social, civic, economic, and moral problems, and must affirm its historic commitment to what I call the scholarship of engagement.”
Faculty exercising the scholarship of engagement are expected to be creative in the development of learning tools and methods of reaching a diversity of learners through *engaged teaching*, *engaged research*, and *engaged service*.

Engaged Teaching

As an experiential learning pedagogy, engaged teaching occurs in both formal (credit) and nonformal (noncredit) educational settings. In formal academic courses, many faculty are already familiar with engaged teaching and learning strategies at the "involve" and "collaboration" levels. Examples include credit classes that integrate learning strategies such as service learning, co-op, externship, internship, practicum, field experience, clinical, practice-based learning, experiential education, or experiential learning (https://www.ccel.msstate.edu/about/whatis/).

At the co-creation level, faculty are co-developing programs with industry and students or coordinating community-led teaching. Courses that use these strategies can apply for a CEL designation course suffix from MSU's Center for Community-Engaged Learning by providing a syllabus and details on community-engaged learning activities, student reflection strategies, mutual benefit for students and the community partner(s), and a dissemination plan for project results. Student learning outcomes in CEL-designated courses include:

1. Analyze and describe the community issue being addressed from multiple perspectives of community stakeholders,
2. Demonstrate effective two-way communication (e.g., listening, speaking, writing) strategies in working with community partners,
3. Adjust their own attitudes and beliefs based on the perspectives of others, particularly those from different backgrounds and viewpoints,
4. Serve on a team to work collaboratively in the role that is needed as opposed to the role that is desired,
5. Apply their academic knowledge from their major/coursework to the community engagement activity, and
6. Clarify their personal civic identity and commitment to public action in the future.

As experts in their chosen fields, faculty also often teach an individual or group in nonformal settings. Nonformal teaching is a step beyond the typical or normal engagement process. When the faculty member moves to this step of teaching the knowledge base, the scholarship of teaching and learning has become critical, even without the requirement of an academic grade. Activities that are two-way processes where both entities mutually benefit include co-teaching with community, industry, or agencies and co-developing programs.

Engaged nonformal teaching is typically organized by a "program." A program is an educational response to an identified issue (Donaldson, 2020). Land-Grant university systems (especially Extension units) already officially defined a "program" as an organized, purposeful set of educational activities and/or experiences that address predetermined outcomes among a target audience (4-H National Headquarters, 2010). Extension faculty also uses this definition and requirement for Extension-appointed faculty, noting additional key elements of a program (Israel et al., 2011):

- Focuses on the needs of the target audience,
- Includes multiple activities that build on and reinforce each other,

- Intends to create change in a sequence of outcomes (knowledge, actions/behaviors, conditions), and
- Incorporates ongoing monitoring to assess progress and a final evaluation to measure outcomes.

Examples of defined programs include (but are not limited to) certificate programs, certifications, short courses, seminars, workshops, field demonstrations and experience, noncredit internships, webinar series, in-service training, and youth camps. As with credit course curricula, a nonformal educational program must be research-based/evidence-based, with objectives, a curriculum, and learner assessment to determine if desired objectives or outcomes have been achieved. Attendance is voluntary and seldom carries academic credit for engaged teaching and learning. However, some engaged nonformal (noncredit) teaching is tied to professional continuing education units (CEUs), certifications, staff development, industry in-service training, partnership evaluations, problem-solving initiatives, technology transfer, and collaboration with industry to identify research priorities.

Just as student reflections and course evaluations are important for determining the effectiveness of formal (credit) courses, learner assessment to document nonformal program outcomes and impacts is critical to engagement. While not every aspect of a program must be evaluated to measure the impact of nonformal teaching, program evaluation provides faculty with an opportunity to demonstrate the outcomes and impacts of their educational efforts on targeted learners. Results of program evaluation can also help faculty identify ways to modify program content and activities or even their teaching approaches for greater success. Thus, feedback from the learners is an important source of information to be used in the evaluation of faculty, just as it is in formal instruction.

Engaged Research

Engaged research also occurs in both formal (credit) and nonformal (noncredit) educational settings. Formal academic courses may incorporate clinical, capstone, undergraduate research, or graduate research projects (https://www.ccel.msstate.edu/about/whatis/). Additionally, faculty often become involved in extending their specialized knowledge and expertise to the public through engagement in research with individuals, groups, communities, and businesses and industries external to their undergraduate and graduate students. They work collaboratively with external groups to develop research questions and conduct research that will resolve problems and improve situations. Such research partnerships are mutually beneficial to the university and communities and include shared decision making and leadership (https://www.ccel.msstate.edu/about/whatis/). Engaged research includes citizen science, convening stakeholders on a research issue, or conducting demonstration projects. Collaboration with groups to identify research priorities, joint problem-solving initiatives, and partnerships for program evaluations are considered engaged research. Finally, co-creation in engaged research involves community science, co-founding startups with external partners, and including partners as authors. Specific approaches, including community-based participatory research (e.g., Collins et al., 2019) and participatory action research (e.g., Cornish et al., 2023), are forms of engaged research.

The scholarship of engagement emphasizes faculty earning grants, awards, and/or fellowships from external sources that support and/or may require providing an educational (engaged teaching) deliverable as part of research dissemination (e.g., seminars, short courses, workshops,

field demonstrations) based on the needs of the community along with traditional research program outputs (e.g., journal publications, conference presentations). Beyond these traditional outputs, translating and sharing research findings with stakeholders outside formal academia is an essential component of engaged research. This can include research-based educational materials for external clientele in the form of (but not limited to) publications, research studies/data, training manuals, apps, training videos, informational web pages/blogs, social media posts, etc.

Faculty are still expected to be scholarly by presenting and publishing the results of their work (e.g., basic and/or applied research, variety trials, and program implementation/evaluation) within traditional academic circles through an assortment of appropriate outlets, including peer-reviewed academic publications, trade journals, outreach publications, industry newsletters, research reports, other media forms that are read by their peers and clientele, and at professional meetings/conferences.

Engaged Service

Engaged service is associated with the use of university expertise to address a problem identified by an individual, community, group, or business and providing beneficial services to address it. University faculty and staff regularly provide outreach services (one-way communication) to these entities through a variety of methods and activities, such as responding to citizen inquiries, providing research-based information, consulting, expert testimony, technical assistance, clinical practice, diagnostic services and serving on boards of directors. These activities are one-way communication and do not require learner assessment or program evaluation.

Engaged service is collaborative and requires two-way communication between the faculty/staff member and the external partner. Engaged service depends upon collaboration and capacity building to being about positive change. University faculty and staff provide engaged service through long-term professional relationships with organizations, communities, businesses, agencies, etc.; serving as subject matter experts; analyzing, developing and influencing policy and legislation; and hosting national associations/societies. At the co-creation level, engaged service includes partnerships with national association, higher ed consortia, and co-hosting seminars, workshops, field demonstrations and other research and educational events for and with external partners.

Planning Engaged Teaching and Research Programs

Faculty plan and implement educational and research programs to address a need or to better understand a phenomenon. Essentially, there are one or more goals of understanding and/or changing awareness, attitudes, knowledge, skills, behaviors, or conditions. When designing engaged teaching and research, starting with the end (goals) in mind ensures activities are developed and implemented that will accomplish objectives that lead toward the goal(s). Use of a formal planning process can be helpful, and the steps involved can be reported in the annual faculty review and p & t application.

The general planning process includes a series of steps: assessing needs and planning, designing the educational or research program, implementing the plan, evaluating implementation, and using/reporting results. Appendix A contains a series of questions to help work through this process for nonformal educational programs, while Appendix B focuses on research studies/programs. A way to visually represent the elements needed for an educational or research program and how those elements connect for success is through developing a logic model (e.g., National Science Foundation, n.d.; University of Wisconsin Division of Extension, 2024; W. K. Kellogg Foundation, 2004). Appendix C contains a brief introduction to logic models.

Assessing Needs and Planning

A need has been described as a gap between "what is" and "what should be" (Witkin & Altschuld, 1995). If needs are not properly identified, all other components of the planning process may be incorrect. Therefore, planning an educational or research program involves:

- Collecting and reviewing literature and data to identify and prioritize the needs and issues of a target audience or community,
- Clearly identifying and describing target audiences, and
- Determining what information is needed and/or what changes are desired and can actually be accomplished (i.e., objectives, outputs, outcomes).

A needs assessment involves "a systematic set of procedures undertaken for the purpose of setting priorities and making decisions about program or organizational improvement and allocation of resources. The priorities are based on identified needs" (Witkin & Altschuld, 1995). A needs assessment can be conducted through various methodological approaches. Note that the Continuum of Engaged Scholarship considers needs assessments as an outreach activity because they involve one-way communication at this point. However, information collected through needs assessments will be used to inform activities in engagement sections of the continuum.

Designing

Designing an educational or research program involves:

- Deciding how the identified objectives, outputs, outcomes, and/or goals should be achieved,
- Identifying or developing educational content (i.e., curriculum) and resources that will be shared with learners or determining the data collection tools/equipment that will be needed to carry out the research program, and
- Developing the implementation process (e.g., methods, timeline, materials).

Educational and research programs should be designed to ensure that they lead to desired outcomes, whether those outcomes are increasing learners' knowledge and skills, improving social conditions, or understanding or explaining a process or phenomenon. Writing SMART (specific, measurable, achievable, realistic, and time-phased) objectives will make the implementation and evaluation processes (the next two steps in program planning) clear. When educational and research programs are co-developed with community partners' active participation, engaged scholarship occurs.

Implementation

Implementation refers to putting an educational or research program into action and includes:

- Training or preparing for program delivery or data collection and analysis,
- Determining logistics and recruiting participants or learners, and
- Delivering the educational content or carrying out the research study.

Differing levels of success in educational and research programs (i.e., desired outcomes achieved) are based on the quantity and quality of implementation. Co-teaching with community partners to implement an educational program and conducting community-based participatory research are considered engaged scholarship.

Evaluating

Determining if an educational or research program was effective in accomplishing its identified objectives and outcomes involves:

- Documenting participation and satisfaction,
- Assessing the process of program implementation, and
- Documenting the resulting outcomes.

Just as formal educational courses include student assessment throughout the course and a teacher evaluation at the end, nonformal educational programs should include learner and educator assessment. Additionally, research programs should document the milestones and objectives reaching during the course of implementation. Why is such evaluation important? In addition to determining the extent to which a program achieves its intended outcomes or objectives, evaluation helps identify what is working well and what needs improvement to inform evidence-based decisions. Evaluation results can also be used in determining an educational or research program's cost-efficiency, for performance reporting, in recruiting and marketing efforts, and as justification for proposed activities in grant applications.

Conducting learner assessment to document program outcomes and impact as well as developing partnerships for program evaluation are considered engaged scholarship. Appendix D includes a list of common methods for conducting learner assessment. Appendix E contains an example of a learner assessment for nonformal (noncredit) education programs.

Reporting and Using Results

Reporting and using results involves:

- Presenting your findings and conclusions to stakeholders,
- Demonstrating accountability,
- Making program-related decisions regarding next steps (e.g., program modification, future work, grant opportunities), and

- Publishing and presenting findings to expand the body of knowledge within and outside academia.

Including community partners as authors when reporting results is considered engaged scholarship. Their perspectives are essential in ensuring that results are interpreted accurately and will be described in a way that will encourage evidence-based decision-making.

Determining Faculty Performance

Using a planning model that connects needs to activities to outcomes/impact can facilitate effective faculty implementation and reporting. Completion of the steps in a program planning model can also be captured in annual faculty reviews and p & t applications. Faculty should demonstrate the ability to develop, deliver, and evaluate a documented engaged educational or research program and provide evidence of their effectiveness in community engagement in these areas.

To help faculty plan, implement and evaluate engaged teaching and research programs, MSU has identified four university-wide engagement impact categories through the strategic development of the institution's *Transformational Plan.* These engagement impact categories identify related activities as part of the goal, *Elevate Our Community*. These impact categories are broad in scope to serve all subject matter and discipline areas and are appropriate for defining performance measures for engaged research and educational programs or projects and operational plans. The engagement impact categories identified are:

- *Social and Culture Impacts* – engaged research and education, and service programs that identify or work to resolve specific needs and challenges related to improving the quality of life for individuals, groups, and communities. These programs will empower local citizens to take collective action to reduce poverty, improve education, literacy, personal and public safety, and overall opportunity. These program impacts will encourage active participation in public affairs, improving decision making and risk management and providing expertise on shaping public policies. It will also include promoting local arts and cultural initiatives, fostering creativity, expression and traditions that play a vital role in the identity, well-being, and growth of communities.

- *Economic Impacts* – engaged research, educational, and service programs that support or seek to improve the economic well-being of individuals, groups, and communities through business development, income equality and growth, investment, population, and infrastructure promotion and growth, and the improvement of the affecting social conditions. This category includes activities designed to increase employment, regional exports, industry competitiveness and market leadership, and the application of new technologies, products, patents, and licenses. These impacts will also focus on increasing income, revenue, and production and heavily engage external partnerships.

- *Environmental Impacts* – engaged research, education, and service programs focused on protecting, preserving, and growing the natural and built environment through activities including, but not limited to, improving the air, water, land, soil, species, ecosystems, sustainable practices, and biodiversity conservation. This category includes efforts focused

on renewable and safe energy, increasing agricultural productivity, and providing a safe food supply.

- *Health and Well-Being Impacts* – engaged research, education, and service programs focused on addressing health needs through the development and implementation of community-based health promotion and care. In addition to a focus on improving health conditions and clinical health outcomes, activities identified within this impact category also support safe and efficient health administration/data practices, social determinants of health, and preparing the future health workforce.

Engaged Teaching

Formal academic classes can include public engagement requirements as a part of the course objectives and requirements. Engaged teaching is often recognized through experiential learning objectives, internships, cooperative education programs, study abroad, field experiences and other forms. Engaged teaching can be reported under "Teaching: Evidence of quality instruction" and the "Teaching: Courses initiated/innovations instituted/other unique teaching contributions" (when applicable) sections of the annual faculty review form and p & t application. Additionally, courses with the CEL designation should be described in the appropriate "Teaching" sections of these documents.

Nonformal educational program activities, such as workshops, seminars, and short courses, can be reported across multiple sections of the annual faculty review form and p & t application. For example, assessing needs and designing a nonformal educational program is reported in the "Teaching: Non-credit educational program planning and development" section of the annual faculty review form.

As noted in the Report of the Faculty Development Task Force (2022), "Effective non-formal/non-credit instruction, although outside the formal educational curriculum and university classroom, similarly requires clear learning outcomes, a curriculum, and assessment of participants' learning" (p. 36). This means that the use of learner assessment and documentation of program outcomes and impact is an important aspect of where faculty activities can be reported. As mentioned, learner assessment in nonformal education programs is equivalent to student course evaluations and other measures of student learning/success in formal academic classes. Therefore, when learner assessment has been conducted and documented, nonformal program implementation is reported in the "Teaching: Implementation of non-credit educational programs" section of the annual faculty review form and the "Non-credit educational programs initiated or instituted" section of the p & t application. Appendix E contains a sample nonformal educational program learner assessment (i.e., program evaluation), while Appendix F contains a sample peer observation form to evaluate nonformal education.

However, if no learner assessment was conducted in nonformal/noncredit educational programs, that implementation is reported in "University, Professional, and Other Service" of the annual faculty review form and the "Public service" section of the p & t application.

Engaged Research

Reporting on engaged research in the annual faculty review form and p & t application refers to the traditional research outputs (e.g., grant funding, conference presentations, journal publications) as well as translating and sharing findings outside academia (e.g., educational programs, social media posts, non-peer-reviewed publications). These activities can be reported in the relevant sections under "Research" based on the type of output/product.

The process of and findings from learner assessment of nonformal educational programs and the use of those findings can be reported in the "Research/Creative Activities/Scholarly Work" section of the annual faculty review form. For example, the process of conducting learner assessment (i.e., program evaluation) can be described as "Research Currently in Progress" which falls into the "Progress of Ongoing Projects" section in the annual faculty review form in the "Research, creative endeavor, or performances – Other" section in the p & t application. Additionally, assessment or evaluation methods, processes, or findings that are presented at conferences or published can be reported in the appropriate "Research" sections (e.g., Journal articles; Monographs, books, or book chapters; Presentations at scientific or professional meetings; Publications, performances or creative activities; Professional papers read; Other) of the annual faculty review form and p & t application as well.

Engaged Service

Engaged service will most likely be reported under "Service: Public service" in the annual faculty review form and p & t application unless learner assessment was conducted; in this case, "Teaching: Implementation of non-credit educational programs" would be appropriate (as previously described).

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Appendix A: Program Design Template

Nonformal Educational Program Design Template

Step 1: Assess Community Needs

A "need" is a gap between "what is" and "what should be" or desired results, future conditions, expected outcomes, or changes in performance. "Community" does not only refer to a specific geographic entity. It refers to a group with shared characteristics (e.g., location, norms, values, interests, demographics).

- What are the characteristics of the community on which you're focusing?
- With your identified community in mind, what key indicators are relevant to understanding community needs? An "indicator" is a piece of data that provides information about a group of clients or potential clients.
- What do the indicators tell you about the current condition?
- What key indicators suggest a need that can be addressed through an educational program?
- What are the causes of the need/problem/issue? Understanding the causes is essential for helping you identify the appropriate target audience and relevant strategies to address the need.
- What additional information do you have or need to collect to better understand the need/problem/issue?

Step 2: Select the Need to Address

Based on your responses in Step 1, answer the following questions.

- What is the identified need/problem/issue you plan to address?
- How did you determine this need/problem/issue?
- Who might be affected – directly or indirectly – and how if this need/problem/issue is not addressed?

Step 3: Design an Educational Response to the Identified Need

Now that you know the need/problem/issue to be addressed, answering the following questions will help you develop the educational program.

- Who is the target audience?
- What barriers (e.g., transportation, scheduling, childcare, accessibility) would the target audience need to overcome to participate in the educational program?
- What can you do to address those identified barriers?
- What are the overarching goals of the educational program? Goals establish a general direction.

- What are the objectives that correspond to each goal? Objectives establish precise expectations of what the educational program is intended to achieve, including a time frame. Use the SMART objective format (specific, measurable, achievable, relevant, time-bound).
- What activities will be implemented? Activities specify the content that will be delivered and the detailed tasks that will be carried out. If there will be multiple sessions, identify key content/activities for each session. Be sure the activities fit the objectives.

Use the table below to elaborate on the details.

Content/Activities	Delivery Method	Estimated Time Needed	Materials Needed

- What are the resource needs, potential costs, and funding sources for the program?
- Are there existing resources, partnerships, and materials that could support the program?

Step 4: Implement Educational Program and Conduct Learner Assessment / Program Evaluation

Implementing the program refers to putting it into action. Before you can deliver the education, you must answer the following questions.

- What training/knowledge is needed prior to implementation?
- When and where will the educational program occur?
- How will you market the program and recruit participants?
- What information do you need to document to show that your educational program was effective?
    - Process: Who participated and how many? What was actually done? What did participants like/dislike?
    - Outcomes: What changes in awareness, knowledge, attitudes, and skills were evident? What changes in practices or behaviors were evident? What changes in social, economic, and/or environmental conditions were evident? Assessing some of the outcomes will require a follow-up after the program has ended and participants have had time to use what was learned.

Step 5: Review, Report, and Use Learner Assessment / Program Evaluation Results

After you have implemented the educational program and conducted learner assessment / program evaluation, review the results and answer the following questions.

- What result(s) suggest the most benefit to participants?
- What result(s) suggest limited benefit to participants?
- Which result(s) would be of most interest to your stakeholders?
- Which result(s) help inform future programmatic or other decisions?
- Based on the results, how could you change the program to enhance success?
- If successful, how can you sustain or expand the program?
- How will you disseminate the results? Results can be shared with stakeholders (e.g., the target audience, funders) and published or presented to expand the body of knowledge.

Appendix B: Research Program Design Template

Research Program Design Template

Step 1: Assess Needs

A "research need" is a gap in knowledge or understanding between what is currently known and what needs to be known to inform decisions, policy, or practice. Consider the following questions to determine the research need:

- What are the characteristics of the research topic you're focusing on?
- With your identified topic in mind, what key indicators or data sources are relevant to understanding the research gap? An "indicator" is a piece of data or evidence that highlights the current state of knowledge.
- What do these indicators suggest about the current state of knowledge or understanding?
- Which indicators point to a gap that could be addressed through a research program/study?
- What are the underlying causes or contributing factors to the identified research gap or issue? Understanding these helps shape the research questions and methodology.
- What additional information or preliminary data do you need to collect to better define the research problem or gap?

Step 2: Select the Research Problem to Address

Based on your responses in Step 1, answer the following**:**

- What is the specific research problem, question, or issue you plan to study?
- How did you determine this research problem or gap? (e.g., literature review, stakeholder input, preliminary data)
- Who or what might be affected – directly or indirectly – if this research problem is not addressed?

Step 3: Design the Research Program

Now that you've identified the research problem, use these questions to guide the design of your research program.

- Who is the target population or sample for your research?
- What barriers (e.g., access to data, recruitment challenges, ethical concerns) might affect your ability to conduct the research?
- What strategies can you use to address these barriers?
- What are the overarching goals of the research program? Goals define the broad purpose of the research.
- What are the specific research objectives or questions? Use SMART format (specific, measurable, achievable, relevant, time-bound) where applicable.
- What research activities will be implemented? These include data collection methods,

instruments, and procedures. If the study involves multiple phases, outline the key activities for each phase.

Use the table below to elaborate on the details:

Research Activities	Methodology	Time Needed	Resources/Tools Needed

- What are the resource needs, estimated costs, and potential funding sources for the research program?
- Are there existing datasets, partnerships, or tools that could support the research?

Step 4: Implement the Research Program and Conduct Data Collection

Before launching the research program, consider the following:

- What training or preparation is needed for the research team prior to implementation?
- When and where will data collection occur?
- How will you recruit participants or access data sources?
- What information will you collect to evaluate the effectiveness and rigor of your research program?
    - Process: Who participated? What was done? What challenges arose?
    - Outcomes: What new insights, patterns, or relationships were discovered? What implications do the findings have?

Step 5: Review, Report, and Use Research Findings

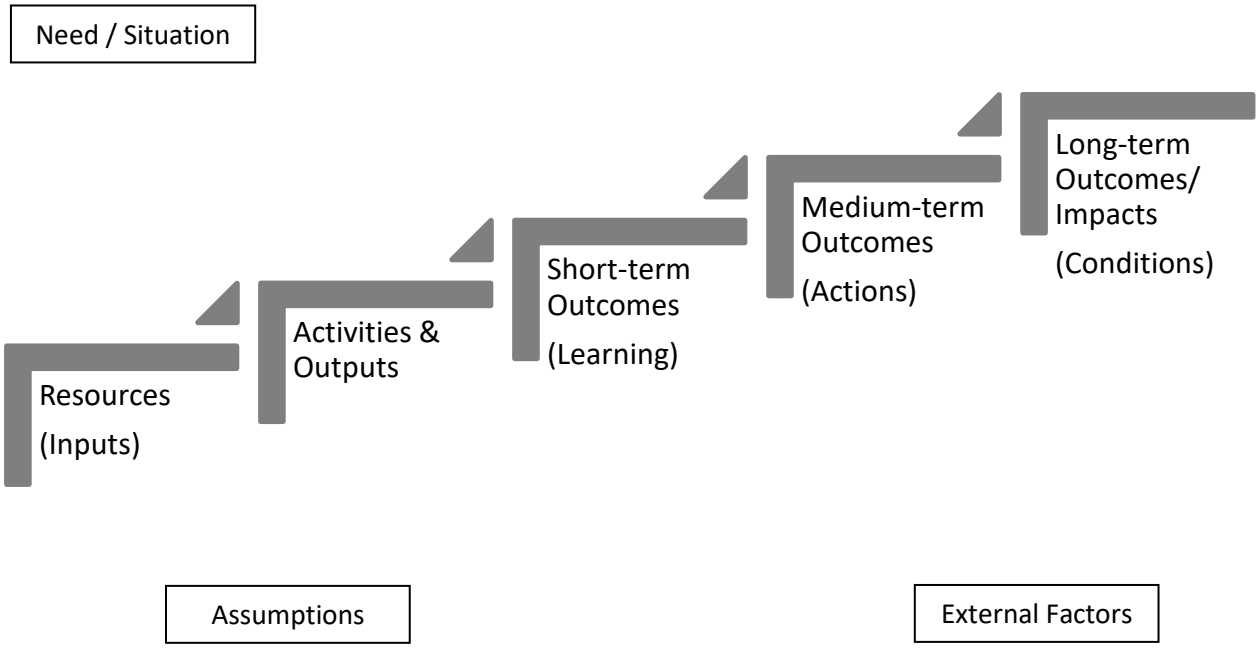
After completing the research and analyzing the data, reflect on the following:

- Which findings suggest the most significant contributions to knowledge or practice?
- Which findings suggest limited impact or require further investigation?
- Which findings are most relevant to stakeholders or decision-makers?
- How do the findings inform future research or programmatic decisions?
- Based on the findings, how could the research design be improved in future studies?
- If successful, how can the research be scaled or expanded?
- How will you disseminate the findings? (e.g., reports, presentations, publications, stakeholder briefings).

Appendix C: Logic Models

Logic Models

A logic model is a broad, visual representation of elements needed for an educational or research program and how those elements connect for success. In other words, a logic model is a systematic and visual way to present the relationships among the resources you have to conduct an educational or research program, the activities to be carried out, and the results or changes you want to achieve. Many funding agencies now require a logic model as part of grant submissions, whether the proposal is for an educational program or for a research project. The figure below shows the typical components of a logic model.



Logic Model Elements

Need/Situation: The need/issue/problem to be addressed by the program.

Resources (Inputs): The resources and contributions that are invested in the program.

Activities: The program's design, content, and delivery.

Outputs: The services delivered, tangible products, or other deliverables that directly result from the activities.

Short-term Outcomes (Learning): Changes in participants' awareness, knowledge, skills, attitudes, opinions, and behavioral intent. Activities and outputs refer to the work done by program staff, while outcomes refer to the changes that occur in participants as a result of the program.

Medium-term Outcomes (Actions): Changes in participants' behaviors, practices, actions, and decision-making.

Long-term Outcomes/Impacts (Conditions): Changes in social, economic, civic, political, and environmental conditions for the participants and beyond. If the long-term outcomes are evident, the initial situation addressed by the program should be resolved.

Assumptions: Beliefs, principles, ideas about the program, people involved, and how the program will work.

External Factors: Elements that affect the program and the way it operates (or are influenced by the program) over which there is little control.

Logic models can be created through developing a series of "if-then statements" – if I have the necessary resources, then I can implement the desired workshop; if I implement the workshop, then my participants will increase knowledge; if my participants increase knowledge, then they will change their behaviors; etc. Working out this sequence can show gaps in logic between the activities you plan to implement and the outcomes that are supposed to follow. Therefore, a logic model can be developed at the beginning of an educational or research program planning process to identify essential elements to ensure success – and then the details can be built around the essentials. A logic model can also be created after the full plan has been developed as a way to summarize or highlight key aspects for other stakeholders.

Summary

In an easy-to-understand format, logic models show the broader impacts intended to result from the work. They can also enhance accountability by keeping stakeholders focused on moving toward the desired outcomes. Logic models are a useful planning tool because they can make underlying beliefs explicit, bring detail to broad goals, and determine priorities for resource allocation. They serve as a guide for implementation and help track what needs to be reported. Logic models are beneficial for educational programs because they specify the activities that lead to changes in knowledge, attitudes, skills, behaviors, and conditions.

Logic Model Resources

- Centers for Disease Control and Prevention. (2024). *Step 2 – describe the program.* https://www.cdc.gov/evaluation/php/evaluation-framework-action-guide/step-2-describe-the-program.html
- Community Toolbox. (2021). *Developing a logic model or theory of change (Chapter 2, Section 1).* https://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main
- United Way. (1996). *Measuring program outcomes: A practical approach.*
- University of Wisconsin-Madison Division of Extension. (2025). *Enhancing program performance with logic models.* https://logicmodel.extension.wisc.edu/
- W.K. Kellogg Foundation. (2004). *Logic model development guide*. https://wkkf.issuelab.org/resource/logic-model-development-guide.html

Appendix D: Common Learner Assessment Methods

Common Learner Assessment Methods

When choosing a method to assess learner outcomes, consider the participants and the type of evidence that will best demonstrate the impact of the learning experience.

- **Knowledge Assessments (Pre- and Post-Tests):** These tests evaluate factual understanding by comparing learners' knowledge before and after the program. The pre-test establishes a baseline, while the post-test reveals what has changed. Analyzing the differences helps determine learning gains.

- **Standardized Certification Exams:** These exams assess learners' competencies against a defined benchmark set by a certifying body. Effectiveness can be gauged by comparing the number of individuals who passed with the total number who took the exam.

- **Surveys and Questionnaires:** These tools are useful for measuring shifts in knowledge, skills, attitudes, awareness, intentions, and behaviors. They also provide insight into participants' experiences and perceptions. Surveys can be administered in various formats—paper, online, phone, or email—and before and after the program or only after.
    - **Pre- and Post-Surveys:** Measure outcomes before and after the learning experience using identical questions, and analyze the differences.
    - **Post-Only Surveys:** Assess outcomes after the learning experience, especially when changes are expected to result directly from the program.
    - **Retrospective Pre/Post Surveys:** When learners may overestimate their initial knowledge or skills, this format allows them to reflect and rate their abilities both before and after the program at the same time (after the program). This helps identify perceived changes more accurately.

- **Qualitative Methods (Interviews and Focus Groups):** These methods offer rich, detailed feedback about learner experiences and the relevance of the program.
    - **Interviews:** Conducted one-on-one, interviews help uncover themes in participant responses that relate to program goals and suggest areas for improvement.
    - **Focus Groups:** These are guided group discussions that reveal shared and differing perspectives among participants. Analyzing the data helps connect feedback to program objectives and identify opportunities for enhancement.

- **Direct Observation:** Observing participants during or after the program can provide evidence of changes in behavior, skill application, and engagement.

- **Reflective Logs or Journals:** Learners document what they've learned and how they've applied it, offering a personal account of changes in practice over time.

- **Physical or Objective Measurements:** These involve collecting quantifiable data using standardized tools to assess physical or behavioral changes resulting from the program.

Appendix E: Sample Nonformal Education Learner Assessment / Program Evaluation Survey

[PROGRAM TITLE]

Please indicate your response to each item.	Strongly Disagree (SD)	Disagree (D)	Neutral (N)	Agree (A)	Strongly Agree (SA)
1. The instructor					
a. was knowledgeable of the subject matter.	SD	D	N	A	SA
b. related program content to real-life situations.	SD	D	N	A	SA
2. The content was					
a. relevant to my needs.	SD	D	N	A	SA
b. at an understandable level.	SD	D	N	A	SA
c. well-organized.	SD	D	N	A	SA
d. based on credible, up-to-date information.	SD	D	N	A	SA
3. Attending this program was worth my time.	SD	D	N	A	SA
4. I would recommend this program to others.	SD	D	N	A	SA
5. I increased my knowledge of the topics covered.	SD	D	N	A	SA
6. I learned new skills related to the topics covered.	SD	D	N	A	SA
7. I will use information I learned in this program.	SD	D	N	A	SA
8. I will tell others about what I learned in this program.	SD	D	N	A	SA

9. The most important thing I learned or gained through this program was:

10. One specific thing I plan to use or apply as a result of this program is:

11. How much of the content covered did you already know?	None	A Little	Some	A Lot
12. How many of the resource materials will you use?	None	A Little	Some	A Lot
13. How well did the information presented meet your expectations?	Not at All	A Little	Some	A Lot

14. Please share any additional comments below.

Appendix F: Sample Peer Observation Form for Nonformal Education Programs

Program/Event Title:

Date:

Educator Name:

Please indicate your response to each item below.	Strongly Disagree (SD)	Disagree (D)	Neutral (N)	Agree (A)	Strongly Agree (SA)
This educator:					
a. Was well-prepared	SD	D	N	A	SA
b. Was enthusiastic about the subject matter	SD	D	N	A	SA
c. Communicated effectively	SD	D	N	A	SA
d. Related the content to real-life situations	SD	D	N	A	SA
e. Provided learners with opportunities to participate	SD	D	N	A	SA
f. Used a variety of methods to teach the content	SD	D	N	A	SA
g. Answered questions clearly	SD	D	N	A	SA
h. Used the total teaching time effectively	SD	D	N	A	SA

What were the objectives of the event/activity?	**What did the educator do well?**
What learning activities/teaching methods were implemented?	**What could be improved?**
Other comments:	