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Conducting Evaluation Activities in a Virtual Environment: We will be getting started at 12:02 ET

You will be muted on entry to the call but can unmute your microphone as needed.





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Conducting Evaluation Activities in a Virtual Environment

Small group discussion and webinar

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Goals

- Introductions
- Discuss considerations for:
 - Obtaining consent and assent
 - Monitoring program delivery
 - Collecting survey data virtually
- Allow you to raise specific issues or questions and get feedback from the group
- Share additional tips you have



Join the Discussion

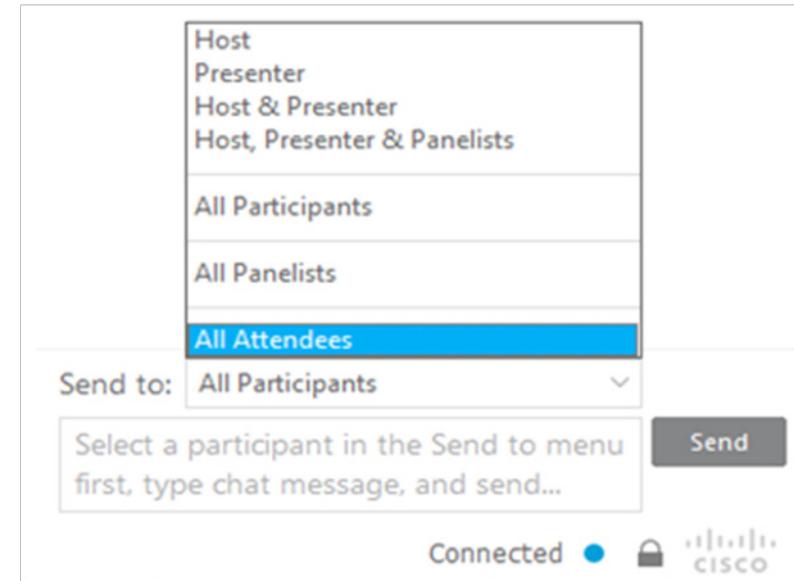
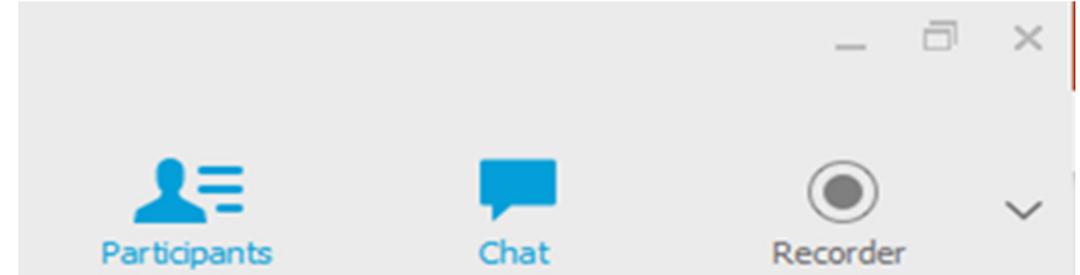
- Attendees are muted on entry into the session. If you would like to speak, click the microphone button next to your name to toggle from muted to unmuted. When you are unmuted, you will no longer see a red "x" by your name.

The screenshot shows a Zoom meeting interface. At the top, there is a 'Participants' panel with a gear icon and a close button. Below it, the 'Speaking' section is visible. Under 'Panelist: 1', there is a profile for 'Derek Mitchell (Event Producer) (Host, me)' with a video camera icon. Under 'Attendees: 2', there are two participants: 'Annie Buonasпина' and 'Jane Choi', both with a red 'x' icon and a red microphone icon, indicating they are muted. At the bottom, there is an 'Audio' section with a speaker icon and a volume slider, and a 'Chat' panel with a close button.



Join the Discussion

- To submit comments or question, use the chat bubble icon at the top of the screen.
- Please use the dropdown box to select the recipients of your chat message. The current options to select from include: Host, Presenter, Host & Presenter, All Panelists, All Attendees, and All Participants.



Obtaining Consent and Assent Virtually



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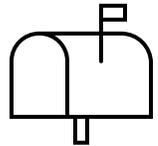


Things to consider when deciding on a consent mode

- Your target population
 - Access to computers, literacy, comfort with technology.
- What contact information is available
- If a mixed-mode design is feasible
 - Consider both electronic and verbal consent.
 - This will help you reach a more diverse pool of respondents, especially those who do not have Internet access or are not tech savvy.



Modes to consider



- Mailing forms
- Email electronic versions (Word files)
- Email or text links to programmed forms
- Verbal consent



Additional considerations

- Youth assent
 - Consider adding the assent question as the first item in your baseline survey.
- Technical support
 - Include a phone number for the study team on forms or in the email text. This will enable people to reach out with technical questions.
- Incentives to boost return rates
- IRB considerations
 - Confirm security requirements such as rules for electronic signatures, transmission of completed consent forms.
 - If working with schools, confirm requirements with school board/district review boards, if applicable.



Questions about virtual consent/assent? Experiences you would like to share?



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Monitoring Quality and Fidelity in a Virtual Setting



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Virtual fidelity monitoring considerations

- Forms for virtual observation
 - Will still include typical in-person items (e.g., time management, engagement)
 - But should also include items related to technology:
 - ✓ Facilitator's ease with technology
 - ✓ Facilitator's use of add-on features (e.g., chat box)
 - ✓ Youth engagement with add-on features
- Fidelity log adaptations
 - Include fields to indicate mode of delivery (e.g., virtual or in-person; synchronous or asynchronous, if doing both)
 - Include fields to note disruptions, like technology issues
 - Noting adaptations and changes is especially important



Additional consideration for tools

- Consider creating a single tool that will work in person and virtually, given the likelihood of delivering in both formats this year
 - Include field to note mode of delivery (in-person, virtual), but also mode of evaluation (e.g., you may observe an in-person class virtually this year, given COVID-related constraints)
- Consider the logistics of submitting completed tools
 - An option is to have facilitators and observers use a service such as Survey Monkey or Google Forms, to make submission and data analysis easier



Assessing quality in a virtual setting

- When you're delivering content to youth virtually ...
 - Challenges:
 - ✓ You cannot observe body language as you do in person
 - ✓ It can be hard to tell whether participants are paying attention or looking at other things on their screen
 - ✓ Youth may not use their camera, especially if they have a poor Internet connection, which further complicates observations
 - Potential approach:
 - ✓ In a virtual setting, it's important to use multiple data points to develop a complete picture for your observation, including:
 - Engagement with add-on features, like a chat box or built-in polls
 - Analytics reports, which can be obtained for platforms like Zoom, Google Meet, and Microsoft Teams; these provide a range of analytics related to attendance, retention, and, sometimes, engagement
 - Surveys of youth to determine overall engagement (in-person vs. virtual)



Assessing quality virtually

- When you're delivering content to youth virtually...
 - Challenges:
 - ✓ There could be alternative explanations for disengagement (e.g., technology issues, distractions at home)
 - Potential approach:
 - ✓ Add detail to your observations with additional data collection:
 - Use polls during a session to gather feedback (e.g., use your platform's built-in polling feature or another program like Menti to ask, “How easy was it for you to engage in today's lesson (scale from 1–5)?”
 - Convene a focus group or administer a survey to assess barriers to engagement and participation (e.g., “What is your learning environment like at home?”)



Assessing quality virtually

- When you're delivering content to youth virtually ...
 - Challenges:
 - ✓ Participants may be more hesitant to contribute to discussions online, as virtual conversations can be more challenging (e.g., people speaking at the same time, tech issues, background noise)
 - Potential approach:
 - ✓ Don't compare observation results across in-person and virtual sessions, given the different contexts
 - ✓ Note or rate the facilitator's efforts to engage students with multiple methods (e.g., discussion AND interactive features, like polls or add-ons, such as virtual whiteboards or apps like Kahoot!)
 - ✓ Note or rate the facilitator's efforts to create an engaging environment (e.g., setting ground rules for participation, guiding the discussion)



Do any teams have experience conducting observations for virtual programming? Any tips or other considerations to share with the group?



Assessing quality virtually

- When you're delivering content to youth who are in person and you're virtual ...
 - Decision 1: Will you record sessions or live stream?
 - Decision 2: Where will you place the video camera(s) and how will you ensure sound quality?
 - Decision 3: Who will be responsible for collecting the data?



Assessing quality virtually

- When you're delivering content to youth who are in person and you're virtual ...
 - Decision 1: Will you record sessions or live stream?
 - Considerations:
 - ✓ Recording sessions will likely require obtaining consent from participants (check with your IRB); live streaming may not require consent, because it's tantamount to being in a classroom.
 - ✓ Live streaming more closely emulates being in the classroom.
 - ✓ Recording allows more flexibility to review for fidelity and quality, and allows observers to pause, go back, skip ahead.
 - ✓ Live streaming requires bandwidth. Can the program setting accommodate this?



Assessing quality virtually

- When you're delivering content to youth who are in person and you're virtual ...
 - Decision 2: Where will you place the camera and how will you ensure sound quality?
 - Considerations:
 - ✓ Prioritize what is most important to observe. Do you need to focus on the facilitator? The participants? Will the session involve small group breakouts?
 - ✓ If you have the resources, you can get more range with an app like Swivl, a platform that rotates to follow the facilitator around the room.
 - ✓ Consider your sound quality approach. An internal microphone in the recording device is likely to pick up whatever is loudest; could have the facilitator wear a wireless microphone and pass it around to participants.
 - ✓ The key is to pilot your approach.



Assessing quality virtually

- When you're delivering content to youth who are in person and you're virtual ...
 - Decision 3: Who will collect the data?
 - Considerations:
 - ✓ Your team may not be allowed in the program or classroom to set up cameras.
 - ✓ In this case, it's important to invest in training someone at the partner site to set up and manage the camera(s). Try to pick someone who is reasonably tech savvy, and ensure they know where to place the camera(s) and how to work the equipment.



Do any teams have experience conducting virtual observations of in-person groups? What lessons have you learned?



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Conducting virtual focus groups

- Focus groups are an opportunity to gain nuanced insights about program quality from facilitators and participants
- Strong practices for virtual focus groups include:
 - Make your groups smaller than you would in person (~6–8 participants).
 - When recruiting, ensure that all participants have access to a device and Internet connection to join the group. Consider alternative approaches for gathering perspectives you might miss by excluding those who can't connect.
 - Use slides to communicate expectations and share questions.
 - Use the chat box or built-in polling features for round-robin questions.
 - Ask participants to use their video.



Collecting Survey Data Online



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Setting and administration considerations

- Setting
 - Where will your sample members be taking the survey?
 - Who might be in the same room or overhear responses?
 - How can you limit distractions?
 - What can you do to ensure privacy?
- Administration
 - Will respondents take the survey on their own?
 - Will the interviewer administer the survey individually or to a group?
 - Will administration methods be the same for treatment and comparison groups?
 - How will you train staff?



Interviewer-administered web surveys

- With this approach, youth take the survey on the web while a staff member reads it individually or to a group via video conferencing.
- Challenges: Ensuring privacy, training staff as interviewers, technical issues
- Potential approaches:
 - Include script on taking survey in a private place, and telling the administrator if they are no longer in a private place
 - Train staff to address engagement concerns
 - Make sure technical support is available during administration, in case there are issues
 - Assume you will need make-up sessions
 - Have a back-up plan



Self-administered web surveys

- Youth take the survey on their own, without the help of an interviewer
- Challenges: Ensuring privacy, youth literacy and focus, breakoffs
- Potential approaches:
 - Make it clear that youth should take the survey in a private place
 - Keep question text simple, include definitions where necessary, and pre-test
 - Keep your survey short and consider soft prompts on key questions left missing
 - Consider whether a staff member can be on a video call while youth are taking the survey, to assess distractions and answer questions
 - Closely monitor your data and have a plan for following up with breakoffs and cases with high levels of missing data



Other considerations

- Selecting a platform
 - Review privacy policies
 - Consider how their data are stored, who has access and how data are transmitted, and data destruction policies
- Tracking sample between rounds of data collection
- Incentive payments



Survey design considerations

- There is a lot of information in the literature on effective web-survey design
- End goal is to limit measurement error, undue respondent burden, and breakoffs
- Examples:
 - Formatting and layout
 - Question and response options
 - Error and validation messaging
 - Mobile optimization



Testing your web survey

- Develop a plan that includes testing:
 - Layout, flow, logic, and timing
 - Using different devices (phones, tablets, computers)
 - Your administration method
- Consider having someone outside your team test the survey
- Export the test data from the survey platform to review
 - This allows you to test branching and gives you a good understanding of what your analysis files will look like



Other mode considerations

- Consider multiple modes for the survey to boost response rates
- You could also send a survey with text messaging with SMS software
 - This is a potential approach for shorter surveys (up to 12 questions)
- Telephone administration (no web survey)
 - Interviewer training is very important with this mode. Consider any sensitive items on your survey and make sure that respondents never have to reveal anything personal when answering.



**Any other thoughts or questions on virtual data collection?
Any lessons learned or successes from previous efforts?**



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Resources

- Consent
 - [Obtaining electronic signatures](#) (Poverty Action Lab)
- Fidelity Monitoring
 - [Virtual focus groups](#) (Child Trends)
 - [Virtual focus groups](#) (MDRC)
 - Technology to [virtual observations](#) (Harvard)
- Surveys
 - [The Design of Grids in Web Surveys](#) (Couper et al, 2013)
 - [Design Effects in the Transition to Web-Based Surveys](#) (Dillman & Smyth, 2007)
 - [Comparison of Paper-and-Pencil Versus Web Administration of the Youth Risk Behavior Survey \(YRBS\): Risk Behavior Prevalence Estimates](#) (Eaton et al, 2010)
- General virtual data collection
 - [Virtual Data Collection Tip Sheet](#) (OPA -available in the Eval TA ToolKit on Max)
 - [Conducting research during the COVID-19 pandemic](#) (American Psychological Association)

