Welcome to the Spring term’s course
*Evaluation Research – Theories and Methods*

This course aims to give you hands-on knowledge on how to develop an evaluation of a project, program or organization (public or private). The course provides you with an overview of different approaches on how to develop and implement an evaluation and give you tools to critically assess how to develop an evaluation that is suited to its defined purpose. We believe that this knowledge will be useful in a future professional context, as different types of evaluations are an increasingly common activity in most organizations.

As a student, you will have the opportunity to participate in theoretical as well as more practically oriented lectures and a series of workshops where you will train both your practical and theoretical skills in relation to performing and assessing evaluations. An important part of the course is the development of an evaluation plan in groups of two.
About Lund University and Graduate School

**Lund University**

Lund University seeks to be a world-class university that works to understand, explain and improve our world and the human condition. The University is ranked as one of the top 100 in the world. We tackle complex problems and global challenges and work to ensure that knowledge and innovations benefit society. We provide education and research in engineering, science, law, social sciences, economics and management, medicine, humanities, theology, fine art, music and drama.

Our 41,000 students and 7,500 employees are based at our campuses in Lund, Malmö and Helsingborg. The University has a turnover of around SEK 7.5 billion (EUR 808 million), of which two thirds is in research and one third in education.

We are an international university with global recruitment. We cooperate with 600 partner universities in over 70 countries and are the only Swedish university to be a member of the strong international networks LERU (the League of European Research Universities) and Universitas 21.

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**Contact info**

1. **Graduate School**
   - Find us on a map
   - E-mail: master@sam.lu.se
   - Home page: graduateschool.sam.lu.se/
   - Facebook: tinyurl.com/GS-Lund-facebook
   - LinkedIn: tinyurl.com/GS-Lund-Linkedin

2. **Student Union**
   - Home page: http://samvetet.org

3. **Lund University**
   - Home page: www.lu.se
   - The university is on iTunesU, Youtube, Facebook, Instagram, LinkedIn and Twitter

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The historic main university building, sometimes informally referred to as the White House, from 1882.
Graduate School

Graduate School at the Faculty of Social Sciences offers interdisciplinary programmes and courses at Master's level. We coordinate three interdisciplinary programmes in Global Studies, Development Studies and Social Studies of Gender, and offer courses in theory of science, research methodology and in interdisciplinary themes.

Graduate School was founded in 2007 in response to the Faculty of Social Sciences’ need to offer interdisciplinary programmes in areas not covered by specific departments. There are currently about 150 programme students roughly distributed in groups of 20 to 40 students per programme. In addition, Graduate School has approximately 300 students taking our classes in theory of science and scientific methodology. We have students from every continent, all with a background in the social sciences. Our international teaching staff come from different departments at the Faculty of Social Sciences, as well as from outside the Faculty.

The Graduate School office is located on the 2nd floor in Gamla Kirurgen, Sandgatan 3.

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Student Reception (open Monday 10-13 Wednesday 10-13)

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Programme Administrator
Graduate School
Faculty of Social Sciences
Lund University, Box 117
221 00 Lund, Sweden

The home of Graduate School used to be part of the city's Old hospital – and its bed wards and operation theatres have duly been transformed into (rather less blood-splattered) lecture theatres and meeting rooms (our classrooms used to be bed wards). The old mortuary is in the basement (we’ve been thinking about organising a Halloween tour one of these years... maybe it’s time?)
Course overview

Teaching and Examination

This course combines lectures with workshops, where students practice skills needed to develop and perform an evaluation, using different types of evaluation strategies. Major emphasis is placed on the development of an evaluation plan in a group of two, the topic is decided by the students themselves. By developing an evaluation plan, students increase their understanding of how to schedule research activities as well as how different theoretical approaches and methodological strategies employed within the broad field of evaluation research may influence the final result of an evaluation.

Students are expected to attend both the lectures and workshops. Workshops will involve activities related to the course literature as well as to the development of the evaluation plan where students will be expected to give constructive feedback to co-students evaluation plans.

Formal student learning outcomes

Upon the completion of the course, the student shall:

Knowledge and understanding

* demonstrate knowledge of different roles an evaluation can have in relation to a policy cycle
* demonstrate an understanding of selected evaluation types and strategies
* demonstrate understanding of the importance of reliable, valid and situated evaluation structure
* demonstrate an understanding of how different evaluation types and strategies may influence evaluation results or the usage of evaluation results.

Competence and skills

* formulate relevant evaluation questions
* develop and convene constructive critique to an evaluation plan
* design and present a coherent scientifically based evaluation study using both verbal and written communication
Judgement and approach

* demonstrate insights in the possibilities and limitations of different types of evaluation strategies and designs
* demonstrate a critical understanding of the role and use of evaluation results in today’s society

Assessment

Overview

You will be graded on four different hand-ins in this course. They will be explained briefly below – a detailed explanation can be found in the detailed plan of the course.

1. Reflection on Evaluation research I
2. Active participation in workshops
3. Reflection on Evaluation research II – individual home examination

1. Reflection on evaluation research I

In order to prepare yourself and get a quick overview of what evaluation research is all about, you start the course by reflecting on the role of evaluation and its relation to research and practice.

The aim of this reflection is to make you look for examples of evaluation practices and to “think evaluation” in relation to your subject area of interest. The aim is not to demonstrate that you have read all of the course literature but that you have started the reading process to introduce you to the abundance of resources – including information that can be found on the internet. This will make you “land” in the evaluation field and begin to form your own opinions of what evaluation research and evaluation practice is all about.

2. Workshops

Detailed instructions for the workshops can be found in the Teaching and Reading section of this document. In total there are seven workshops in the course. Five of these are directly supporting your development of your evaluation plan. In relation to several of the workshops there are related hand-ins. Make sure that you hand these in on time and prepare your student oppositions related to them, when that is relevant.
3. Individual Examination - Reflection on Evaluation Research II

The individual examination is a continuation of Reflection I, handed in at the beginning of the course.

At the end of the course, you will have gained some experience of how evaluations can be done, when they are used and why they may differ.

The detailed topic of Reflection II will only be known to you when the examination starts but it will take its point of departure in the course literature and issues discussed during the course workshops.

The examination is in the form of a home examination and you will have two hours at your disposal where you are obliged to use the course literature to support your arguments.

4. Evaluation plan

Background

The main task in this course is to develop an evaluation plan that aims to evaluate a policy, organisation, programme or project of your own choice and interest. You will work on this plan in groups of two and it is your responsibility to find a partner and a topic for the plan.

The plan should be convincing and helpful in relation to its purpose. It is therefore essential to consider what and who is the target of the evaluation. If you are commissioned to conduct an actual evaluation professionally, the first step is to develop an evaluation plan and present it to the employers. It is important to try to imagine who is the employer and what the employers may want but also to keep in mind what they may not want or imagine. Carole Weiss writes in one of the course books about this relation between the employer and the evaluator in her book and you can draw inspiration from this seasoned evaluator with a long experience of meeting employers!

We encourage you to contact an actual organization and propose the possibility of designing an evaluation for them. It can be an organization close by in Lund, Malmö or Copenhagen that you could visit but it could also be an organization abroad (where you come from or have contacts). This does not give extra points in the grading but does help you to get a better understanding of what evaluation can be about and how to frame it. In addition, it may give you an additional partner to your project beyond your co-students and course teachers.

To support your work there will be five workshops and four non-graded hand-ins which will help to develop your plan in a progressive manner.

Figure 1. Description of the process of how you will develop your evaluation plan

The purpose of the exam is not to write a long essay but to briefly reflect and show that you know the course literature. It is essential that you show your ability to critically reflect on the literature and approaches on how to perform an evaluation, based on the course literature, by making reference to it and comments about it.
For each draft of the plan you hand in, you are supposed to revise the previous section according to new knowledge acquired. Developing an evaluation project (research project) should be seen as an iterative process!

**Piloting**

Even though you will train aspects of the whole process of planning and conducting an evaluation, we only expect you to present a plan. However, as you will see in the course literature, the planning phase including different degrees of piloting of your data collection methods as it is essential to ensure the development of a good and solid evaluation plan.

Piloting means to test and thereafter improve your data collection methods. You can do this in different ways. If you are planning to collect data through interviews, you can test interview questions on co-students, family or friends. Also if possible, on similar interviewees that you have planned to include in your study or persons/experts who have good knowledge on the group of interviewees (you CAN use the internet for this).

If you are going to use different types of statistics as a part of your methodology, you piloting it is important to include an assessment to the extent the statistics exist and reflect its quality. Maybe it is fragmented or has a low quality and for a solid evaluation it would be better if the evaluation is supported by another data set or method than you initially thought.

Piloting improves your methodology and ensures that the method is able to collect the intended information to answer the aim of your evaluation. Piloting may also make you realise that the aim that you have set up for the evaluation was unrealistic and you may need to improve the limitations of your study.

**Motivate your choices**

As this is not a real situation, you are able to explore the possibilities more freely but to motivate your choices. In your final version of the evaluation plan explain and motivate your chosen evaluation approach backed up by references to the course literature (and other scientific evaluation and methodology literature if relevant). This includes motivating the chosen evaluation types and strategies, methodological design, what kind of empirical material that will be collected as well as the evaluation criteria used to assess the results. There is not only one but several possible solutions to an evaluation problem and it is all about how well you corroborate and develop the rationale of your choices. This latter part is actually the scientific or theoretical part of the job and here you are the specialists!

**Length**

You should not write more than 5000 words. Front page (Title, Names, Course Name) and reference list are excluded. The examining teacher will not consider more than 5000 words when examining the papers!

**Limitation**

The planned evaluation should not take more than 6 months work considering the number of persons in the group! This limitation is given to you to help you to become more concrete in relation to the scope of collection of data. Limiting an evaluation or any research proposal to the available resources (time/people) is essentially making it viable - a key requirement both for your upcoming thesis work as well as for your professional future.

**Form and Content**

The paper should follow a traditional paper structure and include the following sections:

- **Introduction** *Why* - (background describing the purpose and future use of the evaluation *(i.e control vs improvement)*) and *Who* (role of different stakeholders; commissioner, performer participant).
- **Aim and Research Question** *What* evaluation object (programme, plan or organisation), main aim and research questions).
- **Methodology** *Which* (evaluation type and strategy) *How* (data collection, sampling, methods for analysis including evaluation criteria).

*In this paper we do not expect a result but a well-structured and detailed research design which will indicate what kind of results will be produced and against which criteria you will analyse them.*
Grades

The grades awarded are A, B, C, D, E or Fail (U). The highest grade is A and the lowest passing grade is E. The grade for a non-passing result is Fail.

The student’s performance is assessed with reference to the learning outcomes of the course. For the grade of E the student must show acceptable results. For the grade of D the student must show satisfactory results. For the grade of C the student must show good results. For the grade of B the student must show very good results. For the grade of A the student must show excellent results. For the grade of Fail the student must have shown unacceptable results.

*Reflection on Evaluation research I* and the active participation in the workshops is awarded with pass or fail, whereas the *Reflection on Evaluation research II* consists of 20% of the final course grade and the *Evaluation Plan* consists of 80% of the final grade.

At the start of the course students are orally informed about the learning outcomes stated in the syllabus and about the grading scale and how it is applied in the course.

Teacher’s criteria for grading the individual examination *Reflection on Evaluation research II* and the *Evaluation Plan* are described in the grading protocol below.

The examining teacher gives for each criterion a high, medium and low grade in the grading protocol, often with a brief comment on what is missing or what is good. Thereafter, these grades are weighed together to form a final grade for each task. The reason why we have selected to use the high, medium, low approach to assess each criteria is that it gives a good indication of strength and weaknesses of your work. The final grade is given to the task as a whole related to the learning outcomes of the course. Marking scales are as follows: A 91-100 B 75-90 C 60-74 D 50-59 E 45-49.

Written feedback in the form of a grading protocol can be expected within three weeks after the end of the course.

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<tr>
<td><strong>Individual exam – Reflection on Evaluation research II</strong></td>
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<tr>
<td><strong>Name of student:</strong></td>
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<tr>
<td>Ability for independent reflection</td>
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<td>Ability to relate to course literature in a critical way</td>
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<td>Language and presentation</td>
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<td>General comment:</td>
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<tr>
<td><strong>Points (Max 20)</strong></td>
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**Evaluation plan**

| **Name of student:** | **Grading** (High (H) Medium (M) Low (L)) |
| Aim of evaluation and its relevance in connection to the need of the potential user of the evaluation |  |
| Choice and relevance of selected evaluation type (Summative or formative) and strategy (Scientific-experimental, management-oriented systems, qualitative/anthropological, participant-oriented etc.) |  |
| Motivation of the advantages and disadvantages with the chosen design in relation to other possible approaches. |  |
| Description and relevance of selected sampling strategies, methods for collecting empirical material and approaches for their analyses. |  |
| **The coherence between the methodological design in relation to defined aim of the plan** (Weight x 2) |  |
| Use of references to back up and motivate your design |  |
| Language and Presentation of the plan |  |
| General Comment: |  |
| **Points (80 Max)** |  |
| **Final Points (max 100) and Grade in (ECTS)** |  |
Re-examination opportunities

If you miss or fail your exam assignment you will be offered two more chances later in the term – dates.

The dates for re-examination include the 30th August & the 25th of October 2019.

Plagiarism

The aim of this course are to teach you how to develop an evaluation plan, and to think critically about how to choose evaluation strategies and method to perform a purposeful evaluation, fulfilling the aims you have defined. All the work for this course involves learning to do methods in a way that shows transparency in the research process, and academic integrity in your own work. This means we place a high emphasis on responsibility and trust in the research process. Your work must be original and a result of your research skills and intellectual efforts.

We follow the Graduate School guidelines and this means the following: all sources must be referenced clearly. Cutting and pasting from the Internet (or elsewhere) is not permitted, although Internet sources can be cited if referenced. To hand in an assignment that to a large part consists of material cut and pasted from the Internet or quote texts authored by others without references is considered as intentional deception. Copying other students, helping someone to cheat or letting a fellow student copy your texts are other examples of intentional deception.

If you intentionally try to deceive the examiner you will be reported to Lund University's Disciplinary Board and will be subjected to disciplinary action.
SECTION 3

Your teachers

CONTACT INFORMATION

1. Johanna Alkan Olsson (course coordinator)
   johanna.alkan_olsson@cec.lu.se
2. John Woodlock (course coordinator)
   john.woodlock@soclaw.lu.se
3. Ana-Maria Vargas Falla
   ana_maría.vargas_falla@soclaw.lu.se
4. Malin Arvidson
   malin.arvidson@soch.lu.se
5. Marie Leth-Espensen
   marie.leth-espensen@soclaw.lu.se

Johanna Alkan Olsson (course coordinator) is a senior lecturer in Environmental Science at the Centre for Environmental and Climate Research at Lund University. She has a PhD from the trans-disciplinary department thematic studies: Environmental Change from Linköping University, Sweden. Her research focuses on governance structures and strategies to induce change to promote sustainable development in a climate change perspective and she is mainly using social scientific methods and approaches to answer her research questions. The research collaborations and project she is involved in are mostly trans-disciplinary.

John Woodlock (course coordinator) is a PhD candidate at the Sociology of Law Department in Lund University. His research project focusses on the field of European Union (EU) civil aviation, the profession of licensed aircraft maintenance engineers and the use of expert knowledge in the aviation regulatory process. In particular his project will explore, from a socio-legal perspective, professional experiences of the complexity and interplay between legal norms and legal forms in civil aviation regulation and governance, and professional norms in relation to the notions of risk, safety and legal accountability, particularly in the face of human error.

Ana-Maria Vargas Falla is the research director of the Swedish International Centre for Local Democracy. In her current position she is responsible for the evaluation system of different projects of international cooperation. She has a PhD in Sociology of Law from Lund University and the University of Milan and her thesis was awarded the prize for best thesis in Sweden in the research area of work life and work environment in 2016. Her main research focus has been the local governance and social control of informal workers in urban areas, including street vendors and rickshaw drivers. She was part of the interdisciplinary group on “nature of peace”, analyzing the impact of peace in the natural environment. Her latest research has been related to the local governance of air pollution.

Malin Arvidson (PhD Sociology) is Associate Professor of Social Work at Lund University. Her research focuses on civil society organizations (CSOs) involved in the provision of welfare services. Her research experiences include CSOs in different contexts including international development (Bangladesh); social service organizations in the UK; and Swedish CSOs engaged in social welfare.

Marie Leth-Espensen is a PhD-candidate at the Sociology of Law Department. Her PhD-project concerns the emergence of the contemporary animal liberation movement and the notion of animal rights. In a socio-legal perspective, her research focusses on how activists use rights as a means and tool to invoke social change. Related areas of interests are social movements studies, French pragmatism, the sociology of rights and Critical Animal Studies.
Course Resources

A Guide to the Reading for this Course

The literature in this course is chosen to give you a basis and background of what evaluation research and theory is (and there is a lot to it!). Through acquiring this base you may find it easier to choose an evaluation strategy that is more efficient, purposeful or interesting for your own evaluation purposes. When it comes to the books listed in the course literature we have organised the readings of the chapters in primary and secondary readings. If you go to the lectures and workshops in this course booklet you will see the readings we want you to prepare before each teaching event.

Primary readings relate to the basic reading you need to do before attending each lecture and workshop. The primary reading relates to the key concepts we are studying. You will need the primary readings to get the most out of the course, to dialogue about the strategies, methods and concepts and to learn how to do evaluation in practice. Secondary readings are parts of the course books that will give you a deeper and broader understanding of the evaluation research field.

Literature needed to support and motivate your choices in your evaluation plan can be found in the course literature but depending on the topic of your plan you may need to find this literature yourselves.

Course Resources – Books

  
  *From the blurb:* The book examines current evaluation theories and traces their evolution within the framework of theories, building upon theories and how evaluation theories are related to each other. Initially, all evaluation was derived from social science research methodology and accountability concerns. The way in which these evaluation roots grew to form a tree helps to provide a better understanding of evaluation theory. Thus, the book uses an evaluation theory tree as its central metaphor. Editor Marvin C. Alkin posits that evaluation theories can be classified by the extent to which they focus on methods, uses, or valuing; these three approaches form the major limbs of the tree.
  
  Available online through LU libraries.

  - 424 pages
  - ISBN 9781412984157


  *From the blurb:* In this important new book, Ray Pawson examines the recent spread of evidence-based policy making across the Western world. Few major public initiatives are mounted these days in the absence of a sustained attempt to evaluate them. Programmes are tried, tried and tried again and researched, researched and researched again. And yet it is often difficult to know which interventions, and which inquiries, will withstand the test of time. The evident solution, going by the name of evidence-based policy, is to take the longer view. Rather than relying on one-off studies, it is wiser to look to the ‘weight of evidence’. Accordingly, it is now widely agreed the most useful data to support policy decisions will be culled from systematic reviews of all the existing research in particular policy domains.

  - 208 pages
  - ISBN 9781412910606
Course Resources – Books (cont’d)


From the blurb: The book provides an overview of the theoretical, historical and methodological aspects of how to perform evaluations and apply research methods in evaluating social programs, illustrating its points with reference to a variety of fields, including education, social services, and criminal justice. It offers practical advice on understanding the reasons for the study, identifying key questions to be answered, and planning and implementing the overall design of the study, including measurement, qualitative methods of inquiry, data collection, analysis, reporting, and dissemination. The book stresses that understanding the underlying theory of the program is essential to developing the most appropriate evaluation, and emphasizes the need to take ethical considerations into account all along the course of the study. It covers meta-analysis, cost-benefit analysis and includes a non-technical discussion of the logic of data analysis. Includes references to further sources on measurement, existing longitudinal data sets, statistics, and qualitative analysis.

The book will be made available on the course platform in the folder 'Literature'.

372 pages ISBN 9780133097252

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Course Resources – Recommended Books


From the blurb: Evaluation—whether called quality assurance, audit, accreditation, or others—is an important social activity. Any organization that "lives in public" must now evaluate its activities, be evaluated by others, or evaluate others. What are the origins of this wave of evaluation? And, what worthwhile results emerge from it?

The book argues that if we want to understand many of the norms, values, and expectations that we, sometimes unknowingly, bring to evaluation, we should explore how evaluation is shaped by social and organizational principles. With this understanding, we can more conscientiously participate in evaluation processes; better position ourselves to understand many of the mysteries, tensions, and paradoxes in evaluation and use evaluation in a more informed way.

Available online through LU libraries.

280 pages ISBN 9780133097252


From the blurb: This book provides a comprehensive introduction to evaluation research, showing how research methods can be applied in a variety of evaluation contexts.

The author:
- illustrates the contribution that both quantitative and qualitative methods can make to evaluation;
- stresses the important part played by theory in the evaluation enterprise;
- introduces some of the conceptual, methodological and practical problems encountered when undertaking this type of applied research, especially in the areas of criminal justice, health care and education.

In this course you will read chapter 1:3 and chapter 7 (103 pages)

Online access through LU libraries: SAGE research methods online

224 pages ISBN 9780761950950
Course Resources – Articles


The logical framework is one of the approaches that we will explore during the course. This article focuses on how to define and measure project success.

5 pages | Download link: www.academia.edu/16298867/Evaluation_theory_tree_re-examined

In this article, authors examine various evaluation prescriptive theories comparatively, following the metaphor of a tree development. This exercise helps them develop a framework that shows how – at the root – evaluation approaches have their theoretical and methodological origins related, as well as highlight features that distinguish theoretical perspectives.

19 pages | Download link: onlinelibrary.wiley.com/doi/10.1002/eve.1411/pdf

In this article, two streams of participatory evaluation are discussed: practical participatory evaluation and transformative participatory evaluation. The authors compare them in relation to control, level, and range of participation.

16 pages | Download link: journals.sagepub.com/doi/abs/10.1177/1356389005060265

A variety of different evaluation models are presented in the evaluation literature. These mostly fall into the following categories: results models, process models, system models, economic models, actor models, and programme theory models. This raises the question: ‘how can evaluation sponsors and evaluators decide how to design an evaluation with so many models to choose from?’ In this article, several – mutually incompatible – recommendations are discussed.


This article shows how evaluation that is politically sensitive and culturally aware is carried through a specific case study. Theory of knowledge as well as dramaturgy theory are also brought forth, highlighting the conundrums, complexities and richness of assessing support services to terminally ill people. Alongside a series of findings, the authors conclude the necessity to distinguish evaluation research from forms of research that are insufficiently resourced and poorly implemented.

Olsen, O., & Lindøe P. 2004 “Trailing research based evaluation: phases and roles”. 
*Evaluation & Program Planning*, Vol. 27; 4; 371-381
11 pages | Not available online

The shortcomings of standardized and expert evaluations and the shortcomings of action research have reoriented many professional change agents to a new style of intervention, monitoring and evaluations. In this process, a concept of trailing research evaluations has been developed in order to utilise the strengths of both traditional and action research approaches in evaluations. That implies a double role for the evaluator and a need for a double mind when the evaluator at first contributes to the process of change and then is supposed to ‘prove’ the changes.


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15 pages | Download link: [journals.sagepub.com/doi/pdf/10.1177/1356389010372452](journals.sagepub.com/doi/pdf/10.1177/1356389010372452)

This article investigates the dissemination of evaluation as it appears from a Swedish and to a lesser extent an Atlantic vantage point since 1960. Four waves have deposited sediments, which form present-day evaluative activities.
**Course Resources – Other**

**Book chapter**


This text delves into the participatory evaluation approach and particularly the collaborative evaluation variant. The first chapter on “Practicing Evaluation” introduces the variants of the participant evaluation approach. The chapter (4) on “Designing Collaborative Evaluations” provides a description on the more practical aspects on collaborative evaluations.

**Working document**


This text provides a classic understanding and use of evaluation in the European Commission. Given the great importance that evaluation practices have within the EU apparatus and their systematic and broad use over decades, it is certainly informative for any evaluation neophyte.

**Course Resources – Links**

**Writing research questions**

* [twp.duke.edu/uploads/media_items/research-questions.original.pdf](twp.duke.edu/uploads/media_items/research-questions.original.pdf)
* [masscommtheory.com/2011/05/05/writing-good-qualitative-research-questions/](masscommtheory.com/2011/05/05/writing-good-qualitative-research-questions/)

**Databases**

* Sage Research Methods Online [srmo.sagepub.com](srmo.sagepub.com)
* Sage Encyclopedia of Qualitative research methods [knowledge.sagepub.com/view/socialscience/SAGE.xml](knowledge.sagepub.com/view/socialscience/SAGE.xml)
* Research methods knowledge base (on Evaluation) [www.socialresearchmethods.net/kb/evaluation.php](www.socialresearchmethods.net/kb/evaluation.php)
* Evaluation toolbox [evaluationtoolbox.net.au/](evaluationtoolbox.net.au/)

* [Sage Research Methods Online srmo.sagepub.com](srmo.sagepub.com)
* [Sage Encyclopedia of Qualitative research methods knowledge.sagepub.com/view/socialscience/SAGE.xml](knowledge.sagepub.com/view/socialscience/SAGE.xml)
* [Research methods knowledge base (on Evaluation) www.socialresearchmethods.net/kb/evaluation.php](www.socialresearchmethods.net/kb/evaluation.php)
* [Evaluation toolbox evaluationtoolbox.net.au/](evaluationtoolbox.net.au/)
Section 5

Detailed course overview

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<td>2/5, 9\text{\textasciitilde}10.00 &amp; 10\text{\textasciitilde}12.00</td>
<td>Lectures 1 &amp; 2  \ Johanna A Olsson, Ana-Maria Vargas Falla &amp; John Woodlock</td>
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<td>Introduction &amp; Evaluation Types &amp; Strategies</td>
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<td>7/5, 13\text{\textasciitilde}15.00</td>
<td>Workshop 1  \ Ana-Maria Vargas Falla &amp; John Woodlock</td>
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<tr>
<td></td>
<td>Evaluation Strategies</td>
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<td>8/5, 10\text{\textasciitilde}12.00 &amp; 13\text{\textasciitilde}14.00</td>
<td>Lecture 3 - Workshop 2  \ Johanna A Olsson, Ana-Maria Vargas Falla, Marie Leth-Espensen &amp; John Woodlock</td>
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<td>Contextualising Evaluation Practice &amp; Evaluation Plan Idea</td>
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<td>Workshop 3  \ Johanna A Olsson, Ana-Maria Vargas Falla, Marie Leth-Espensen &amp; John Woodlock</td>
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<td>Workshop 4  \ Ana-Maria Vargas Falla &amp; John Woodlock</td>
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<td>Evaluating Graduate School - Evaluation Strategies in Practice</td>
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<td>Lecture 4  \ Malin Arvidsson</td>
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<td>17/5, 13\text{\textasciitilde}15.00</td>
<td>Lecture 5  \ Johanna A Olsson, Ana-Maria Vargas Falla &amp; John Woodlock</td>
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<td>How to plan an evaluation?</td>
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<td>21/5, 17\text{\textasciitilde}18.00</td>
<td>Deadline: Hand-in 3</td>
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<td>23/5, 10\text{\textasciitilde}12.00 &amp; 13\text{\textasciitilde}15.00</td>
<td>Workshop 5  \ Ana-Maria Vargas Falla, Marie Leth-Espensen &amp; Johanna A Olsson</td>
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<td>Evaluation Plan - Type &amp; Strategy</td>
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<td>24/5, 17\text{\textasciitilde}18.00</td>
<td>Deadline: Hand-in 4</td>
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<td>27/5, 10\text{\textasciitilde}12.00 &amp; 13\text{\textasciitilde}15.00</td>
<td>Workshop 6  \ Ana-Maria Vargas Falla, Marie Leth-Espensen &amp; John Woodlock</td>
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<td>Evaluation Plan - Methods</td>
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<td>28/5, 10\text{\textasciitilde}12.00</td>
<td>Deadline: Hand-in 5</td>
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<td>3/6, 09\text{\textasciitilde}10.00</td>
<td>Deadline: Hand-in 6</td>
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<td>3/6, 10\text{\textasciitilde}12.00 &amp; 13\text{\textasciitilde}15.00</td>
<td>Workshop 7  \ Ana-Maria Vargas Falla, Marie Leth-Espensen &amp; John Woodlock</td>
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<td></td>
<td>Evaluation Plan: Presentation</td>
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<tr>
<td>5/6, 17\text{\textasciitilde}18.00</td>
<td>Deadline: Hand-in 7 Final version of evaluation plan</td>
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NB. Regularly check the course lesson plan in Live@Lund for potential schedule alterations
Teaching and Reading Schedule

**Introduction to Evaluation**
(lecture 1) | Teacher: Johanna Alkan Olsson

This lecture will first explain and motivate the course content and setup, expected learning outcomes and grading structure. Thereafter a structure for how an evaluation can be thought of will be proposed and show how the different tasks and lectures in the course are linked to this structure. After this lecture, students will have a clear understanding of what is expected of them during the course and should be able to estimate the workload and plan their efforts accordingly.

**Evaluation Types and Strategies**
(lecture 2) | Teacher: Ana-Maria Vargas Falla

This lecture is divided into two parts. Part 1 will introduce students to the historical development of the theory and practice of evaluation, the difference between evaluation and social scientific research, suggest a definition of evaluation and outline why and when evaluations are done in relation to the policy cycle distinguishing between two major types of evaluations (formative and summative).

Part 2 will present evaluation strategies, summarized into four main categories:

1. randomized experiments
2. the logical framework
3. qualitative approaches
4. participatory approaches.

The lecture will highlight that choices on which strategy to use are connected to a number of factors, such as the research tradition you come from, which sector is evaluated and on the approach and aims of the evaluation. After this lecture, students will have a better understanding of the discussions around the practice of evaluation as well as about the similarities and differences between the four main evaluation strategies.

**Primary reading**
Weiss, Chapter 1 “Setting the Scene” & Chapter 2 “Purpose of Evaluation”.
Clark & Dawson, Chapter 1 “Understanding Evaluation” & Chapter 2 “Quantity and Quality: Paradigmatic Choices in Evaluation Methodology”
Article: Vedung

**Secondary reading**
Evaluation Strategies
(workshop 1) | Teacher: Ana-Maria Vargas Falla

Aim
The aim of this workshop is to get acquainted with four main evaluation strategies and increase your understanding of their similarities and differences.

Structure
The workshop runs in two parts. In the first half (13h-14h30), you will discuss the assigned literature in four groups. Group division will be made by the teachers before this workshop. The same groups will be used in workshop 4 the 15th of May. Each group will have time to prepare the questions (below). The last 30 minutes will be used to make a short oral presentation per group five minutes per group plus discussions.

Questions;
* What are the main differences and similarities among these strategies?
* What strategies can or can't be combined? Why?
* What are the different aims of each of these four strategies?
* How (methods) do we conduct an evaluation using each of these four strategies?

The second part of the workshop (10h45-12h00) will be dedicated to present the evaluation topic you will work on during the May 9th workshop; The Graduate School.

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<td>Participatory Approaches</td>
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During this seminar you will work in four (4) groups. The reading material is divided by groups, you should read mainly the literature assigned to your group. If you have time can read the other literature.

**Literature for Group 1: Randomized Experiments**
Weiss, Chapter 9: “Randomized experiment”

**Literature for Group 2: The Logical Framework**
Article: Baccarini, David

**Literature for Group 3: Qualitative Approaches**
Weiss, Chapter 11

**Literature for Group 4: Participatory Approaches**
Article: Cousins & Whitmore. “Framing participatory evaluation.”

**Secondary reading**

What happens if you fail to attend this event?
What to hand in: A 900 word text reflecting on the four questions above (including reference list).
How to hand in: Live@Lund (ASSIGNMENT: EXTRA) If you have several rests, hand them in together one document.
When to hand in: Last day of the course no later than 18.00.
**Contextualising Evaluation Practice**  
(lecture 3) | *Teacher:* John Woodlock

This lecture aims to examine the historical development of evaluation research, understood within its social and ideological context. Starting from the acknowledgment of the great variety of approaches and innumerable ramification strategies that assist evaluation research today, we trace the nature of evaluation upstream, back to its initial roots and then return to the present day. This biographical exercise of evaluation will reveal how the present diversity can still be traced back to basic epistemological principles that run through the veins of evaluation’s scientific ancestry. It also opens the ground for discussing the social life of evaluation, that is, the social conditions and political implications that derive from doing - or not doing – different forms of evaluation. After this lecture, students will have a better grasp of the changing role of evaluation practice in our societies.

**Primary reading**

*Dahler-Larsen*, Introduction, Chapter 1 and Chapter 2.

*Article:* O’Brien et al.

**Secondary reading**

*Article:* Dahler-Larsen, Chapter 3-7 plus End Matter.

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**Evaluation Plan Idea**  
(workshop 2) | *Teachers:* Johanna Alkan Olsson, Ana-Maria Vargas Falla, Marie Leth-Espensen & John Woodlock

**Aim**

To make an early start on finding a partner and develop your idea for the evaluation plan.

**Structure**

This workshop is the first of five workshops linked to the development of the evaluation plan. In this workshop you will have scheduled time to:

* identify your group partner
* develop your evaluation plan idea
* exchange your ideas briefly with the teacher

If you need to queue for your time with the teacher use the time to develop the idea and draft the text for hand-in 2.

**What happens if you fail to attend this event?**

If you do not attend this event you will fail to get an initial input on your evaluation plan idea, you will need to wait for the next workshop related to the evaluation plan. No feedback will be given by mail. If you miss more than two workshops related to the evaluation plan (five in total) you will need to make a written opposition to the ppts presented by your workshop group (900 words) and hand it in 5th of June in the assignment called rests.
Please note that there are two hand-ins on this day!

Hand-in 1: Reflection on Evaluation Research I

In order to prepare yourself and get a quick overview of what evaluation research is all about, you start the course by reflecting on the role of evaluation and its relation to research.

Aim

The aim of this reflection is to make you look for examples of evaluation practices and to “think evaluation” in relation to your subject area of interest. The aim is not to demonstrate that you have read the course literature but to introduce you to the abundance of resources – including information that can be found on the internet. This will make you “land” in the evaluation field and begin to form your own opinions of what evaluation research and evaluation practice is all about.

Content

Your paper may cover:

1. The role of evaluation and evaluation research in today’s society; who does it and why?
2. What is the relationship between evaluation research and other types of social scientific research areas (differences/similarities)?
3. In your subject area or area of interest, in what way does evaluation play a role?
4. In what area or activity would you like to do an evaluation and why?

This assignment is not graded but you have to hand it in.

Form

Word document or similar, refer to course literature, other literature or internet sources when relevant.

Length

Do not write more than 1000 words including references.

Upload:
Live@lund (ASSIGNMENT: Reflection on Evaluation Research I) No later than 17.00!

Peer review

Literature suggestions

* Course literature: good to start reading it, lectures will assist you in interpreting them further.
* Sage Research Methods Online: you can find access to this through the LU library (if you have not used this source before it is a good opportunity to start).
* The internet: there is an enormous amount of information on evaluation strategies and practice on the www so use this opportunity to explore this source!
**Hand-in 2: Evaluation Plan, Context and Aim**

**Aim:** When developing an evaluation plan, it is essential to understand the context of the programme, policy or organization you are evaluating, in order to establish a solid aim. It is therefore crucial to spend some time to get a deep understanding of the organisation or plan/programme that you are going to evaluate.

If you have access or can get access to stakeholders (programme managers, beneficiaries, etc.), try to establish communication with them through meetings or telephone calls. It is clear from previous years that students who engage with a real case, even in an imagined way, are much more likely to understand and learn the real challenges of preparing an evaluation.

**Content**
The text should include: tentative title, students full names, an account for; Why the evaluation (background, purpose and use of evaluation (i.e control versus improvement); Who (role of different stakeholders; commissioner, performer participant; What (evaluation object (programme, plan or organisation) as well as main aim and research questions).

**Form**
Word document or similar.

**Length**
Do not write more than 1000 words including references.

**Upload**
Live@lund (ASSIGNMENT: CONTEXT AND AIM) No later than 17.00!

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**Evaluation Plan – Context and Aim**
(Workshop 3)  
*Teachers:* Johanna Alkan Olsson, Ana-Maria Vargas Falla, Marie Leth-Espensen & John Woodlock

**Aim**
This workshop aims to help you develop the aim of your evaluation plan and ensure it is well linked to the context of the evaluated plan/policy/organisation.

**Workshop structure**
During this workshop you will queue up for one of the present teachers. Bring a set of questions you want to ask concerning the context and aim of your evaluation plan to discuss with the teachers.

**What happens if you fail to attend this event?**
If you do not attend this event you will fail to get input on your evaluation plan, you will need to wait for the next workshop related to the evaluation plan. No feedback will be given by mail. If you miss more than two workshops related to the evaluation plan (five in total) you will need to make a written opposition to the ppts presented by your workshop group (900 words) and hand it in 5th of June in the assignment called rests.
Evaluating Graduate School Master Programme - Evaluation Strategies in Practice
(workshop 4) | Teacher: Ana-Maria Vargas Falla & John Woodlock

Aim
This workshop aims to train you in how to use - in practice - different strategies in the process of planning an evaluation. It follows from Workshop from May 2nd in which you have become acquainted with a potential “real case”, presented by the Graduate School at Lund University. It is a ‘learning by doing’ seminar, with some preparation from your side.

Background
For details on background please see Appendix I in this document

Group division
Group division will be made after lecture 2.

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Preparation
Each group will specialise on one pre-decided evaluation strategy and develop a plan accordingly. Before the workshop:
* The reading was listed in relation to the Workshop: Evaluation Strategies - literature discussion. Revise the reading related to your group’s strategy.
* Identify and read more scientific texts related to your strategy, if necessary.
* Read the background document available in section 6 of this document.
* Write down the main steps in designing an evaluation according to the assigned strategy: Hand in a copy of your preparation to the workshop teacher

Workshop structure
During the first four hours (from 9-12) you will outline your evaluation plan. 14-15 will be allocated for the preparation of the presentation in the form of a power point. The last two hours (15-17) will be dedicated to presentations; each group presents its proposal. The presentation should last no more than 15 minutes and then the floor is opened for a general discussion (10 minutes per group).

The evaluation proposal should follow the logic of the evaluation strategies your group has been assigned. It should also give a concise reply to the Graduate School’s theme of evaluation using the ‘classic’ evaluation guidelines (described below). This can include identifying gaps and/or needs that you, as an evaluator identify, and that you wish to communicate.

* why (background, purpose, use of evaluation i.e control vs improvement)
* who (role of different stakeholders; commissioner, performer participant)
* what (evaluation object (programme, plan or organisation), main aim, research questions)
* which (short description of evaluation strategy)
* how (data collection, sampling, analysis methods including evaluation criteria)
* where to (main finding, dissemination, utilisation of results)

What happens if you fail to attend this event?
What to hand in: A 1000 words text outlining an evaluation plan based on the evaluation strategy assigned to the group you were allocated to (including reference list). The last page should be a personal reflection on the strengths and weaknesses of your plan).

How to hand in: Live@Lund (ASSIGNMENT: EXTRA) If you have several rests, hand them in together one document.

When to hand in: Last day of the course no later than 18.00
Experiences from Evaluation of Development Projects
(lecture 4) | Teachers: Malin Arvidson

In many international development projects and increasingly so in the social services of welfare states in the North, NGOs, small and large, play a significant role. The lecture will focus on the challenges involved with evaluating the achievements of NGOs in a context that includes many stakeholders representing different interests and preferences for evaluation models. The lecture will discuss political and ethical aspects of evaluations, and offer a concrete example of the evaluation of an NGO. After the lecture the student will have a better understanding of the real conditions of making evaluations linked to the theoretical knowledge of them that you can receive from books and scientific articles.

Primary reading
Kara, Helen and Arvidson, Malin (2014) To what extent can evaluation frameworks help NGOs to address health inequalities caused by social exclusion? Perspective in Public Health, July 2015 vol 135 no 4

How to Plan an Evaluation?
(lecture 5) | Teacher: Johanna Alkan Olsson, Ana-Maria Vargas Falla & John Woodlock

Overview
The aim of this lecture is to give you the structure for how an evaluation plan structure developed and why (following 6 steps and the link between them). The exercise of linking the cycle of evaluation is also an invitation to carefully reflect on the actual coherence of the plan (what Weiss calls “understanding the programme”).

There is a variety of data collection methods available to the evaluator. In this session we will discuss how methods can be selected and used in a creative, realistic but also fully operative way. Good choices of methods not only lead to good results, they are inherently coherent with the overall structure of an evaluation plan.

After the lecture the student will have a deeper understanding of the role and structure of planning and evaluation as well as concrete examples of why planning is important and what good planning does to the quality of the evaluation.

Primary reading
Clark & Dawson: We will mainly use chapters 2, 3 and 7 in this book. Chapter 2 Quantity and Quality: Paradigmatic Choices in Evaluation Methodology provides a good summary of the main differences between experimental and quasi-experimental design and qualitative approaches. Chapter 3 Methods of Data Collection provides details on how to use different social science methods when conducting evaluations. Chapter 7 discusses the utilization of evaluation, such as the use of evaluation findings, factors affecting utilization and how to maximize utilization.

Indicative guidelines on evaluation methods: evaluation during the programming period, Working Document No. 5. European Commission Directorate-General, Regional Policy Thematic development, impact evaluation and innovative actions. (20p)

Secondary reading
Alkin Marvin (2004) Part II Methods
Hand-in 3: Evaluation Plan: Type and Strategy

Aim
This hand in helps you to choose and integrate an evaluation type and strategy in your plan.

Content
The text should include; tentative title, students full names, an account for; Why the evaluation (background, purpose and use of evaluation (i.e control versus improvement); Wbo (role of different stakeholders; commissioner, performer participant); What (evaluation object (program, plan or organisation), main aim, research questions); Which (evaluation strategy)
Work on improving the aim as as well as motivate your choice of evaluation strategy using course literature or other available literature

Form
Word document or similar.

Length
Do not write more than 1000 words more than previous evaluation plan hand-in including references.

Upload
Live@lund (ASSIGNMENT: AIM AND EVALUATION STRATEGY)
No later than 17.00!

How to plan an evaluation & Evaluation Plan - Type and Strategy (workshop 5) | Teacher: Ana-Maria Vargas Falla, Marie Leth-Espensen & Johanna A Olsson

Workshop aim
Aim: This workshop aims to help you choose and integrate an evaluation strategy for your evaluation plan that is logically linked to your defined aim.

Preparation:
1. Prepare a short oral presentation of the state of the art of your plan (5 minutes, no slides required).
2. Develop questions related to your own work
3. Read the papers in your group.
4. Prepare comments, constructive suggestions for improvements and questions. Bring them to the seminar.

Workshop structure
1. Presentation five minutes per group
2. 15 minutes discussion and comments led by the other groups, the presenting group may ask for help to answer their developed questions.

What happens if you fail to attend this event?
If you are not able to attend this event you are obliged to inform your partner that you are not able to attend and he or she will forward the constructive criticism you have prepared jointly. If neither of you are able to participate, do not hand in the Aim and Evaluation strategy hand-in! No feedback is given by mail.

If you miss more than two workshops related to the evaluation plan (five in total) you will need to make a written opposition to the ppts presented by your workshop group (900 words) and hand it in 5th of June in the assignment called rests.
**Hand-in 4: Evaluation Plan – Methods**

**Content**
The text should include; tentative title, students full names, an account for; How you will perform your evaluation

Which empirical material you will collect and why? (strengths and weaknesses using relevant methodological literature)

* How you will sample (select what you collect) your empirical material and why? (strengths and weaknesses using relevant methodological literature)

* How you will collect selected empirical material, methods of data collection timing and why? (strengths and weaknesses using relevant methodological literature)

* How you will analyse the result including the development of evaluation criteria?

**Form**
Word document or similar.

**Length**
Do not write more than 1000 words more than previous evaluation plan hand-in including references.

**Upload**
Live@lund (ASSIGNMENT METHODS)

**No later than 15.00!**

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**Evaluation Plan: Methods**
(Workshop 6) | Teachers: Ana-Maria Vargas Falla, Marie Leth-Espensen & John Woodlock

**Workshop aim**
This workshop is meant to help you develop your discernment of which methods to choose for your plan.

**Preparation**
1. Short oral presentation of current status of your plan (5 minutes, no slides required).
2. Develop questions related to your own work
3. Read the papers of the other groups in your group.
4. Prepare an opposition with comments, constructive suggestions for improvements and questions. Bring them to the seminar.

**Workshop structure**
1. Presentation five minutes per group
2. 15 minutes discussion and comments led by the other groups, presenting group may ask for help to answer their developed questions.

**What happens if you fail to attend this event?**
If you are not able to attend this event you are obliged to inform your partner that you are not able to attend and he or she will forward the constructive criticism you have prepared jointly. If neither of you are able to participate, do not hand in your Methods hand-in! No feedback is given by mail.

If you miss more than two workshops related to the evaluation plan (five in total) you will need to make a written opposition to the ppts presented by your workshop group (900 words) and hand it in 5th of June in the assignment called rests.
Hand-in 5 – Reflection on Evaluation Research II
For general instructions see under the headline assessment earlier in this text. The examination questions will be made available at the start of the examination.

Upload
Live@lund (ASSIGNMENT: REFLECTION II)
No later than 12.00!

Hand-in 6 – Powerpoint for Workshop 7
Hand in the powerpoint you prepared for workshop 7 for feedback.

Upload
Live@lund (ASSIGNMENT: REFLECTION II)
No later than right after the workshop.

Evaluation Plan: Presentation
(workshop 7) | Teachers: Ana-Maria Vargas Falla, Marie Leth-Espensen & John Woodlock

Aim
The aim of this workshop is to develop a Powerpoint presenting your evaluation plan, to convey the main aspects of your plan: context of the evaluation, theoretical approach and methods and how your plan will fulfil the aim of the whole evaluation.

The presentation is to be created as if it is meant to be presented to a board of your potential employees. Remember that the quality of a presentation, both visually and verbally, often has a great impact in how your audience receives your message and therefore plays a key role in the success of future professional endeavours. Don't hesitate to experiment as you strive for high quality!

Form
Oral presentation of ten minutes using a powerpoint and ten minutes will be allocated for discussion based on questions from the other groups and the teacher.

Content
Introduction, Aim and Research Question, Methodology Discussion/Conclusion (related to how the plan is able to fulfil the stated aim of the evaluation)

Length
No more than 6 slides (ten minutes per presentation) The emphasis should be given to Methodology and Discussion (two slides each)

What happens if you fail to attend this event?
What to hand in: A maximum 6 slides ppt containing a presentation of your plan according to the content described above.

How to hand in: Live@Lund (ASSIGNMENT: EXTRA) If you have several rests, hand them in together one document.

These should be handed in no later than the last day of the course all in the same document!
**Hand-in 7 – Final version of evaluation plan**

For general instructions see under the headline ‘Assessment’ earlier in this text.

**Upload**

Live@lund (FINAL VERSION OF EVALUATION PLAN)

**No later than 18.00!**

**Hand-in 8 – Rests**

This hand in is relevant if you have been absent from seminars. Instructions for what to do you can find in the boxes "What happens if you fail to attend this event?" These boxes you can find after each workshop description.

**Upload**

Live@lund (RESTS)

**No later than 18.00 last day of the course.**
SECTION 6 (APPENDIX I)

Course project
Evaluating Graduate School

Background
Graduate School was founded in 2007 as a result of the faculty's alignment with the Bologna process, and after extensive deliberations with the involvement of all the faculty's departments. The aim was to enable alignment with other European educational structures and facilitate mobility. The Faculty's decision to offer English-speaking programmes would also allow a possibility to offer education to a much wider group of students and so become more internationally competitive in regards to attracting researchers, teachers and students. The initial years were strenuous and staff (both academic and administrative) as well as students faced numerous challenges that required new ways of thinking and the setting up of specific structures to support international students – and more generally students in international programmes. Organisationally, Graduate School operates at the level of the Faculty and is thus not its own department. The strategic document that Graduate School follows is therefore the Faculty's strategic document, where internationalisation is one of the key focus areas. In this document the following objectives are established:

1. to reinforce international perspectives in education
2. to increase and deepen collaboration with strategic partners and leading universities
3. to increase the number of outgoing students who spend at least half a semester of their study programme abroad
4. to strive for balance in our exchange student agreements
5. to ensure a high level of knowledge of English among lecturers and other staff
6. to promote mobility among teachers and other staff

The first point is directly related to Graduate School, while the other objectives are connected but not the direct responsibility of Graduate School. International perspectives in education have been addressed through international perspectives in:

- course and programme content and methods
- student recruitment, admissions and retention
- supporting structures such as integrated activities, workshops, events and information material.

We also strongly encourage our students to go on exchange or enrol in the internship course, which often take place abroad.

Why an evaluation
The main purpose of the evaluation is to assess the degree to which we have incorporated international perspectives in our programmes' education and to understand the main drivers and obstacles for further development work. What are the key indicators? What have been the main benefits of internationalisation for the different stakeholders? Which areas have been developed satisfactorily? Which areas need further improvement?

Use of the evaluation
The results of this evaluation will be shared with the Graduate School board for discussion and possible follow-up.

Stakeholders
Graduate School staff headed by the Director of Studies has commissioned this evaluation. The main stakeholders are current students and teachers as well as prospective students, alumni, partner universities, internship organisations, potential employees in both Sweden and abroad. Supporting staff and other entities at the university working with internationalisation such as External Relations and the Faculty International Office can also be viewed as a stakeholder.