

UNIVERSITY OF  
MARYLAND  
EXTENSION

# Program Assessment Tool

February 2022

## **Introduction:**

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Programs are the foundation of Extension’s educational strategies. Yet, despite the literature and all of the expertise that exists, Extension faculty and administrators often find it difficult to assess the development stage of the program. Extension organizations and educators often describe a program as “signature” without criteria of what that term means. It is also difficult to take an objective view of a program and decide if further resources are warranted that can move it from a good idea with limited applicability to a statewide effort that meets a critical public need or issue. A national environmental and literature scan of Extension resources did not produce a tool that established criteria to make informed program assessments. Because of these and several other reasons, the UME Program Assessment Tool (PAT) was developed.

The PAT is based on the two well-known and used educational tools: rubrics and logic models. Like a rubric, the PAT provides criteria that can be used to help make decisions or judgments about where a program stands in the development process. Like a logic model, the PAT can be read from left to right—starting with the emerging and developing stages on the left where Extension efforts are more focused on outputs, to the right where the focus is on signature and evidence-based programs and outcomes.

Impact Teams will use this tool to make decisions about which programs will be sent forward to be peer-reviewed for signature status, as well as to determine emerging and developing programs that will be priorities for further investments. For some programs, they will be critiqued for an evidence-based status.

## **Acknowledgements:**

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The UME Program Assessment Tool (PAT) was developed by Teresa McCoy, Assistant Director, Evaluation & Assessment, and Dr. Bonnie Braun, Professor and Extension Family Policy Specialist with assistance of Nicole Finkbeiner, M.S., Graduate Research Assistant. This tool is based, in part, on the the Curriculum Assessment Tool (CAT) and the Materials Assessment Tool (MAT) created by Bonnie Braun and Nicole Finkbeiner, November 2012. All three assessment tools are contained in the Extension Education Theoretical Framework Manual, to be published in 2013 by the University of Maryland Extension.

The PAT was reviewed as part of a formative evaluation by the following members of the UME Health Smart Team: Karen Aspinwall, Virginia Brown, Nancy Lewis and Elizabeth Maring.

The PAT was also reviewed by the UME program leadership team of Dr. Patsy Ezell, Assistant Director, Family & Consumer Sciences; Dr. Jeff Howard, Assistant Director, 4-H Youth Development; Dr. Andy Lazur, Assistant Director, Agriculture & Natural Resources; Dr. Doug Lipton, Director, Maryland Sea Grant Program; and Tom Miller, Assistant Director of Operations. The need for this tool was identified during the leadership of Dr. Nick Place, Associate Dean/Associate Director of UME, now the Dean and Director, University of Florida Institute for Food and Agricultural Sciences. .

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*Bonnie Braun*

## Definitions of Terms

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Many terms in this tool could be interpreted in multiple ways. For purposes of use of the PAT, we've provided a short list of terms and our definitions.

<b>Curriculum</b>	A specific learning program with targeted learners, goals and objectives, learning activities and materials.
<b>Educational Intervention</b>	The programming done by Extension salaried and volunteer faculty and staff.
<b>Evaluation Methods</b>	The evaluation strategies that will be used to determine program outcomes.
<b>Evaluation Use</b>	What type of data will be collected and how it will be used.
<b>Needs Assessment</b>	"A systematic way ... for identifying education and training problems, needs, issues, and the like" (Caffarella, 2002, p. 123).
<b>Programs:</b>	
<b>Informational</b>	A UME-branded program that delivers research-based information.
<b>Developing</b>	A UME-branded program in early stages of demonstrating its public value.
<b>Signature</b>	A UME-branded, research-based program known for its demonstrated public value.
<b>Evidence-Based</b>	A UME branded program that can be replicated with similar outcomes based on scientific measure of effect and judged by external reviews to meet standardized assessments.
<b>Program Scholarly Outputs</b>	Products that document the educational intervention including theory, findings, and effectiveness measures. Refereed reviews are the gold standard of judgment of quality of educational interventions.
<b>Research Base</b>	The science of the curriculum content, delivery, and evaluation.

## Instructions for Using PAT

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- A. Individuals and Impact or other teams should use the PAT under these conditions:
  - 1. When assessing a current program for the extent to which it meets the criteria and deciding
    - a) what to do to strengthen the program to remain in that category, or
    - b) if it's time to end the program or hand-off to a non-Extension entity.
  - 2. When determining what would need to be done to advance the program into a next category.
- B. In some cases, stakeholders and partners should be included in completing the assessment. In other cases, an external review may be helpful.
- C. **ALL** boxes need to be checked for a program to meet the requirements of its category.

We recognize that programs are constantly evolving and go through cycles, perhaps moving forward and backward in these four types of categories that we have established. Programs need to change as the needs of individuals and communities that we serve change. Program evaluations often bring forth evidence that program changes are needed. This understanding is best described in the Cornell Office for Research and Evaluation (CORE)'s *The Guide to the Systems Evaluation Protocol* (2012):

“Each iteration of a program is related to the program’s history but is also shaped by decisions based on new information about how and how well the program works, and about what is needed by the target audiences or community; and by purely external factors like funding availability. The process of evolution involves learning, changing, and ultimately strengthening the larger system as a program is run, evaluated and revised and re-run over time” (p. 18)

## University of Maryland Extension Program Assessment Tool

CATEGORY	Informational	Developing	Signature	Evidence-Based
	<b>Needs Assessment:</b>			
<b>Fit with UME Mission (Program Design)</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Represents an emerging public issue or need that could be addressed by UME.</li> <li><input type="checkbox"/> Based on some evidence of the issue and/or need</li> <li><input type="checkbox"/> Included in at least one IEP.</li> <li><input type="checkbox"/> Not yet included in TEP.</li> <li><input type="checkbox"/> Minimal or no specific UME funding or other resources dedicated to addressing the emerging issue or need through a formal UME program.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Represents a developing public issue or need that can be addressed by UME.</li> <li><input type="checkbox"/> Based on substantive evidence of the public issue or need AND the capacity of UME to make an impact.</li> <li><input type="checkbox"/> Included in multiple IEPs.</li> <li><input type="checkbox"/> Included in at least one TEP for development.</li> <li><input type="checkbox"/> Start-up UME funding or other resources committed to addressing the issue or need through a formal program.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Represents a priority of UME based on identified public issues and/or needs of the people of the state.</li> <li><input type="checkbox"/> Provides sufficient evidence of impact to justify commitment of resources to conduct program.</li> <li><input type="checkbox"/> Defines the distinctiveness of UME from other organizations in addressing the public issue and/or particular need of the people of the state.</li> <li><input type="checkbox"/> Included in multiple IEPs across multiple disciplines.</li> <li><input type="checkbox"/> Identified as a signature program in at least one TEP.</li> <li><input type="checkbox"/> Adequate funding and other resources from UME and others to have an impact on the issue or need through a program that is known outside of UME among public decision-makers and the people of the state.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Represents an on-going priority(ies) of UME based on identified public issues and needs of the people of the state.</li> <li><input type="checkbox"/> Provides sufficient evidence to justify commitment of resources needed to substantially address the issue or need over time.</li> <li><input type="checkbox"/> Documents the distinctiveness of UME from other organizations to address the public issue and/or particular needs of the people of the state or beyond.</li> <li><input type="checkbox"/> Included in multiple IEPs across multiple disciplines.</li> <li><input type="checkbox"/> Included as a signature program in at least one TEP.</li> <li><input type="checkbox"/> Adequate and sustained funding and other resources from UME and others, including states that replicate the program, to address the national issue or need and provide scientifically rigorous evidence of impact.</li> </ul>

CATEGORY	Informational	Developing	Signature	Evidence-Based
<b>Meets Critical Clientele Needs (Program Development)</b>	<b>Educational Intervention:</b>			
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exchange of information to answer questions and address concerns.</li> <li><input type="checkbox"/> Information is transferred to client for immediate use.</li> <li><input type="checkbox"/> Information is research-based.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exchange of information is for immediate use and could lead to change over time in an individual's knowledge, attitude, skills, and aspirations (KASA).</li> <li><input type="checkbox"/> Information and methods of teaching/learning are research and theory-based.</li> <li><input type="checkbox"/> Contact time with client is of a short-to-medium duration and may be face-to-face and/or through different types of media.</li> <li><input type="checkbox"/> May involve key partners or stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exchange of information leads to documented change in an individual's knowledge, attitude, skills, and aspirations (KASA).</li> <li><input type="checkbox"/> Exchange of information is used to aid in the solution of a public issue or need of individuals, families, and communities.</li> <li><input type="checkbox"/> Information and methods of teaching/learning are research and theory-based.</li> <li><input type="checkbox"/> Contact time with client is of a medium-to-long duration and uses multiple methods of contact, including face-to-face and different types of media.</li> <li><input type="checkbox"/> Involves key partners and stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Exchange of information leads to scientifically-rigorous, documented change in an individual's knowledge, attitude, skills, and aspirations (KASA) over time.</li> <li><input type="checkbox"/> Exchange of information is used to aid in the solution of a public issue or need of individuals, families, and communities.</li> <li><input type="checkbox"/> Information and methods of teaching/learning are research and theory-based.</li> <li><input type="checkbox"/> Contact time with client is of a medium-to-long duration and uses multiple methods of contact, including face-to-face and different types of media.</li> <li><input type="checkbox"/> Involves key partners and stakeholders.</li> <li><input type="checkbox"/> Uses program strategies that have been scientifically tested and proven successful for public issues and needs of people.</li> </ul>

CATEGORY	Informational	Developing	Signature	Evidence-Based
	<b>Curriculum:</b>			
	<input type="checkbox"/> No curriculum.	<input type="checkbox"/> Program curriculum under development is tested based on the UME Extension Curriculum Assessment Tool (CAT) and, when appropriate, the Materials Assessment Tool (MAT). <input type="checkbox"/> Program curriculum changes have been made based on the UME Extension CAT and, when appropriate, the MAT. <input type="checkbox"/> Curriculum has been pilot-tested using appropriate testing methods. <input type="checkbox"/> If curriculum is adapted from another source, is subjected to the CAT and, if appropriate, to MAT, and pilot tested for appropriateness in state and modified as needed.	<input type="checkbox"/> Program curriculum developed using the UME Curricula Assessment Tool (CAT) review guidelines. <input type="checkbox"/> Program curriculum adapted from another state has been peer reviewed using the UME Extension CAT and, when appropriate, MAT, and modified to meet Maryland needs. <input type="checkbox"/> Curriculum has been both internally and externally peer-reviewed. <input type="checkbox"/> Curriculum has been published with a UME signature-program endorsement. <input type="checkbox"/> Curriculum is available to other states to use and adapt.	<input type="checkbox"/> Program curriculum developed using the UME Curricula Assessment Tool (CAT) review guidelines. <input type="checkbox"/> Program curriculum adapted from another state has been peer reviewed using UME CAT and, when appropriate, the MAT. <input type="checkbox"/> Curriculum produces evidence-based results.
<b>Research &amp; Scholarship (Program Development &amp; Delivery)</b>	<b>Research Base:</b>			
	<input type="checkbox"/> Uses research-based information.	<input type="checkbox"/> Theory and research-based information is explicitly explained and incorporated into the development of program.	<input type="checkbox"/> Theory and research-based information are used to explain impact measures and outcomes. <input type="checkbox"/> Provides information that can be used to build additional intervention strategies and research questions.	<input type="checkbox"/> Theory, research-based information, and empirical evidence are explicitly integrated in explanation of program intervention impacts on intended outcomes. <input type="checkbox"/> Program research results provide evidence to build additional theoretical models. <input type="checkbox"/> Program research results provide evidence that allows for further research study funds to be generated.

CATEGORY	Informational	Developing	Signature	Evidence-Based
	<b>Program Scholarly Outputs:</b>			
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program activities cited in CVs and annual faculty reports for merit review.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program activities cited in CVs and annual faculty reports for merit review.</li> <li><input type="checkbox"/> Conference and professional association posters.</li> <li><input type="checkbox"/> Conference and professional association workshops and presentations based on preliminary data.</li> <li><input type="checkbox"/> Contributions to eXtension Communities of Practice (COP).</li> <li><input type="checkbox"/> UME peer-reviewed Extension Briefs and/or Factsheets.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program scholarship findings cited in CV and annual faculty reports for merit reviews.</li> <li><input type="checkbox"/> Program scholarship findings used in promotion and tenure packages for decisions about Senior or Principal Agent advancement and for merit reviews.</li> <li><input type="checkbox"/> Program results presentations at professional association meetings, workshops, panels, and other types of delivery methods-- both refereed and non-refereed.</li> <li><input type="checkbox"/> Invited presentations and articles about program results.</li> <li><input type="checkbox"/> Contributions to eXtension Communities of Practice (COP).</li> <li><input type="checkbox"/> Refereed articles in subject-based journals.</li> <li><input type="checkbox"/> UME peer-reviewed Extension Briefs, Factsheets, Bulletins, Manuals, and Curricula.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program scholarship findings cited in CV and annual faculty reports for merit reviews.</li> <li><input type="checkbox"/> Program scholarship findings used in promotion and tenure packages for decisions about Senior or Principal Agent advancement and for merit reviews.</li> <li><input type="checkbox"/> Invited presentations and articles about program results from other states, regions, and countries.</li> <li><input type="checkbox"/> Evaluation results add to a national evidence-based database.</li> <li><input type="checkbox"/> Invited presentations and articles about program results are issued from other states, regions, and countries.</li> <li><input type="checkbox"/> Primary authorships in eXtension Communities of Practice (COP).</li> <li><input type="checkbox"/> Journal editorial board memberships.</li> <li><input type="checkbox"/> Refereed articles in highly-acclaimed journals.</li> <li><input type="checkbox"/> UME peer-reviewed Extension Briefs, Factsheets, Bulletins, Manuals, and Curricula.</li> <li><input type="checkbox"/> Books or book chapters.</li> </ul>



CATEGORY	Informational	Developing	Signature	Evidence-Based
Program Evaluation	<b>Evaluation Use:</b>			
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Data collected and evaluated to determine participant knowledge gain and satisfaction level with the interaction experience.</li> <li><input type="checkbox"/> Evaluation results are used to communicate reach of Educator’s work.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Dated collected and evaluated to determine participants’ short-term KASA outcomes and clientele satisfaction level with the interaction experience.</li> <li><input type="checkbox"/> Evaluation results used to determine program effectiveness and to communicate effectiveness of Educator’s work to meet clientele needs.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Data collected and evaluated to determine medium-term outcomes achieved that benefit clientele and/or the community.</li> <li><input type="checkbox"/> Evaluation results used to communicate UME’s value in addressing societal, economic, and environmental needs.</li> <li><input type="checkbox"/> Evaluation results used to communicate the effectiveness of Educator’s work to meet clientele needs in Maryland.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Data collected and evaluated to determine long-term outcomes achieved that benefit clientele.</li> <li><input type="checkbox"/> Evaluation results used to communicate UME’s impact on compelling societal, economic, and environmental issues in Maryland.</li> <li><input type="checkbox"/> Evaluation results used to communicate state and national impacts on compelling societal, economic, and environmental issues.</li> </ul>
	<b>Evaluation Methods:</b>			
<ul style="list-style-type: none"> <li><input type="checkbox"/> End-of-session instruments used to determine client satisfaction.</li> <li><input type="checkbox"/> No IRB approval required if client satisfaction will not be published.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Basic logic model developed.</li> <li><input type="checkbox"/> End-of-session instruments used for program improvement.</li> <li><input type="checkbox"/> Paired or unmatched pretests and posttests assessments for KASA changes.</li> <li><input type="checkbox"/> Qualitative methods incorporated where appropriate (structured observations, interviews).</li> <li><input type="checkbox"/> IRB approved.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Logic model is fully developed.</li> <li><input type="checkbox"/> End-of-session instruments used for program improvement.</li> <li><input type="checkbox"/> Paired or unmatched pretests and posttests for assessment of KASA changes.</li> <li><input type="checkbox"/> Qualitative methods incorporated where appropriate (structured observations, interviews).</li> <li><input type="checkbox"/> Follow-up survey research used to assess medium- term outcomes.</li> <li><input type="checkbox"/> Control and comparison groups used where appropriate.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Logic model is fully developed and tested for utility over time.</li> <li><input type="checkbox"/> Results of evaluations have been subject to critical peer review.</li> <li><input type="checkbox"/> Empirical evidence exists about program effectiveness.</li> <li><input type="checkbox"/> Program results grounded in rigorous evaluations using experimental or quasi-experimental studies with randomized control groups.</li> <li><input type="checkbox"/> Program can be replicated by other states with confidence in program effectiveness.</li> <li><input type="checkbox"/> Findings are published in peer-reviewed journals and</li> </ul>	

CATEGORY	Informational	Developing	Signature	Evidence-Based
			<ul style="list-style-type: none"> <li><input type="checkbox"/> Findings are used to improve programs.</li> <li><input type="checkbox"/> Findings are peer reviewed and published when appropriate.</li> <li><input type="checkbox"/> IRB approved.</li> </ul>	<p>other publications.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> IRB approved.</li> </ul>
<b>Adoption &amp; Replication (Program Dissemination)</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Potential for adoption and replication unknown.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Has potential to become a program that can be replicated by Extension or others in state.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Recognized by respected agencies and organizations as an effective program.</li> <li><input type="checkbox"/> Adopted by other organizations or Extension services.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program is promoted and adopted nationally as an empirically-tested intervention with identified short-, medium-, and long-term outcomes.</li> <li><input type="checkbox"/> Program materials (curriculum, protocols, evaluation instruments) exist that make adoption and replication possible.</li> </ul>
<b>Marketing &amp; Communication (Program Dissemination)</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> No formal marketing plan, but program is advertised at the local level through flyers, newspaper articles, newsletters, or word-of-mouth.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> No formal marketing plan, but advertising has extended beyond the local community.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Formal marketing plan in place and evaluated for effectiveness.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Effective components of a formal marketing plan are used.</li> </ul>
<b>Public Value (Program Dissemination)</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program value is evident to the individual participants using information.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program value is evident to the individual participants using information and participating in the program.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program's value is evident to individuals, families, and the community-at-large.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program's value is evident to individuals, families, and the community-at-large.</li> <li><input type="checkbox"/> Program's public value is determined by people or agencies outside of UME using this assessment tool or one used by an agency with a standardized tool and or a process for judging value.</li> </ul>

CATEGORY	Informational	Developing	Signature	Evidence-Based
<b>Sustainability (Organizational Commitment)</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Minimum resources are required to initiate elements of a program.</li> <li><input type="checkbox"/> Internal resources used to launch the program.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Short-term resources committed from Impact Teams to assist program in developing into signature program.</li> <li><input type="checkbox"/> Short term external funding secured to assist in developing program.</li> <li><input type="checkbox"/> Potential partners identified.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Medium-term resources committed to supporting the program from the UME budget pending evidence of potential for impact.</li> <li><input type="checkbox"/> External funders may be involved in on-going support of the program.</li> <li><input type="checkbox"/> Partners involved in program when appropriate.</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Long-term funding in UME budget due to evidence of impact.</li> <li><input type="checkbox"/> External, long-term funding or partners secured to maintain programming.</li> <li><input type="checkbox"/> National partners involved in program when appropriate.</li> </ul>

**References:**

Boyle, P. (1981). *Planning better programs*. New York: McGraw-Hill.

Caffarella, R. S. (2002). *Planning programs for adult learners*. San Francisco: Jossey Bass.

Cornell Office for Research on Evaluation. (2012). *The guide to the systems evaluation protocol*. Ithaca, NY: Cornell Digital Print Services. Available from <https://core.human.cornell.edu/research/systems/protocol/index.cfm>