Planning and evaluating impact of scholarship and educational research initiatives

Shailey Minocha, Faculty of STEM, The Open University, UK
Twitter/X: @ShaileyMinocha; @drtrevorcollins
(On Microsoft Teams™)

The content is shared under Creative Commons license: Attribution-NonCommercial-ShareAlike 4.0 International (CC BY-NC-SA 4.0, https://creativecommons.org/licenses/by-nc-sa/4.0/)

Impact evaluation initiative (2021–2022)

• A compendium of 16 case studies
• A guide for educators
• SoTL* impact evaluation workbook
• Planning for SoTL impact workbook
• Executive summary

*SoTL: Scholarship of Teaching and Learning
UK’s Research Excellence Framework (REF) defines impact as ‘an effect on, change or benefit to the economy, society, culture, public policy or services, health, the environment or quality of life, beyond academia.’


Impact of SoTL or an educational inquiry

The impact of a SoTL inquiry implies **demonstrable benefits to learning and teaching** that are directly attributable to that project.

**Impact of SoTL answers the question:** what has changed because of this SoTL inquiry? What new insights will other educators gain from this SoTL inquiry? How can the institution put the outcomes of the inquiry into use? What are the current or emerging debates in HE does this inquiry contribute to?

Three scholarship projects

- Early start programme
- Diagnostic quizzes
- Cross-level Design events

Impact Evaluation Framework (IEF) for SoTL

12 facets of IEF for SoTL are divided into four categories:

1. Learning and Teaching
2. Transfer to others
3. Stakeholder benefits
4. Cultural and economic benefits


Impact Evaluation Framework (IEF) for SoTL

- Guidance at the project proposal stage
- Workshop with the project team and other stakeholders
- Planning and monitoring the impact
- Self-evaluation


Pause for reflection and questions
### Theory of Change (ToC) Template

<table>
<thead>
<tr>
<th>1 situation/problem</th>
<th>What situation/problem is the project trying to address or resolve?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 context</td>
<td>What is the current context of the situation/problem?</td>
</tr>
<tr>
<td>3 Aim</td>
<td>What goal or objective is the programme/initiative trying to achieve? What is your proposed solution to the problem given the context?</td>
</tr>
<tr>
<td>4 stakeholders</td>
<td>Who are the stakeholders (including the beneficiaries) of the project?</td>
</tr>
</tbody>
</table>

#### Planning

<table>
<thead>
<tr>
<th>7 resources/inputs</th>
<th>7+ activities</th>
<th>7++ outputs</th>
<th>6 outcomes and measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the human, financial and organisational resources required to achieve the desired outcomes?</td>
<td>Activities that will mobilise the inputs to produce outputs. Outline the interventions (supported by assumptions) that will bring about the desired change.</td>
<td>What are the results/deliverables of the activities relevant to the achievement of the outcomes?</td>
<td>Short and intermediate-term outcomes and measures which must be in place for the long-term goals to be achieved.</td>
</tr>
</tbody>
</table>

#### Intended Results

<table>
<thead>
<tr>
<th>~ assumptions</th>
<th>The various conditions on which the project’s success will rely on.</th>
</tr>
</thead>
<tbody>
<tr>
<td>~ risks</td>
<td>Risks to activities? Risks to impacts not being achieved, or leading to unintended consequences?</td>
</tr>
<tr>
<td>5-6 time</td>
<td>When will you conduct the various activities? When do you expect the impact to be achieved?</td>
</tr>
</tbody>
</table>

### Name: project

[theme – brief description]

<table>
<thead>
<tr>
<th>Inputs</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Theory of Change: Question-driven template, Logic Model

- **Question-driven template**: Designed to identify the key information required to develop a theory of change
- **Logic model**: A visual representation of the key information and the links between them
- **Theory of Change (ToC)**: Using the key information (questionnaire) and the visual representation (logic model) identify the key causal pathways for impact


Development of Theory of Change (ToC)

- Project plan
- ToC (question-driven template)
- ToC visual
- ToC visual and narrative

An example

- Scholarship of Teaching and Learning in STEM BOC

- Question-driven ToC, visual

- Logic Model


Resources for SoTL impact

- A guide for educators, Section 7, p. 72

Identifying stakeholders

- Participatory role
- Advisory role
- Advocates
- Communications role
- Amplifiers
- Beneficiaries
- Obstructors

Strategies for planning and generating impact

- Planning for the impact from the beginning
- Aligning SoTL with the strategic priorities of the institution
- Conducting collaborative SoTL
- Sharing findings of SoTL strategically
- Using social media to create community and connection
- Employing a variety of research methods to collect evidence of impact

Values of a SoTL practitioner for impactful SoTL

- Inquisitive
- Open-minded
- Ethical
- Strategic
- Empathetic
- Generous


Any challenges that you anticipate or may have experienced in planning for and generating impact?