Louisiana's State-Funded Compensatory/Remedial Program requires two different evaluations: a study of the statewide program and local evaluations conducted by the 66 public school systems involved in the program. The State Education Agency (SEA) evaluation unit is responsible for (1) conducting the statewide evaluation and (2) exercising quality assurance over, and providing technical assistance to, the local evaluations. State Board of Education policy requires that both evaluations apply the Standards for Evaluations of Educational Programs, Projects, and Materials. This paper is written from the point of view of evaluation management and discusses the accountability uses of the processes and information for statewide and local evaluations. It identifies the organization and management relations developed to carry out the evaluations and discusses the issues arising in implementing evaluations that affect more than a single program or organizational unit. The issues discussed include maintaining the legitimacy of the evaluations and other SEA efforts, balancing the needs of other programs, using the evaluation information, balancing the dual role of the SEA evaluation unit, and assuring quality in the evaluation. (Author/PGN)
ACCOUNTABILITY USES OF A STATEWIDE COMPENSATORY EDUCATION PROGRAM EVALUATION

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INTRODUCTION

This paper is written from the perspective of an SEA evaluation unit with a dual role in the evaluation of the Louisiana State-Funded Compensatory/Remedial Program evaluation. The Bureau of Evaluation within the Office of Research and Development is responsible for conducting the State program evaluation and for managing the quality control of local evaluations of the program. The preceding papers in this symposium have discussed additional components of Louisiana's competency-based education effort. This presentation is limited to the evaluation of the State-Funded Compensatory/Remedial Program but notes other State Education Agency (SEA) programs and units that were involved in the program or its evaluation. The objective is to identify the accountability uses of program evaluation information when a new and comprehensive program effort is initiated and to discuss the issues that can arise in the collection and use of such information.

"Accountability" is used here in a broad sense. It includes the demonstration of whether or not a program is a) meeting the objectives for which it was designed and b) carried out in agreement with the legislation and regulations governing its activities.

DESCRIPTION OF THE EVALUATIONS

Louisiana's State-Funded Compensatory/Remedial Program requires that each public school student addressing the State's minimum standards in language arts and mathematics who fails to achieve the performance criteria established by the Board of Elementary and Secondary Education on the State Basic Skills Test (BST) be provided with remedial instruction in these skills. The program is supported entirely by State funds allocated to the local school systems on the basis of the number of qualifying students per subject area. The BST was initiated in the spring of 1982 for grade 2 students. A grade level will be added each year until
all grades, 2 through 12, are tested annually in 1992. In the first administration of the BST, 6,243 students tested in grade 2 qualified for the State-Funded Compensatory/Remedial Program.

The enabling legislation for the program, Louisiana R.S. 17:394-400, places specific reporting requirements on the State Superintendent of Education that comprise the justification for a State-level evaluation. The Superintendent is required to report annually to the legislature and the State Board on the effect of the program, the number of students served, the cost, and which programs are most effective. The legislation also requires local evaluations to be conducted by the school systems conducting compensatory/remedial programs.

The State evaluation is conducted by the SEA Bureau of Evaluation. The program regulations, developed by the SEA and approved by the State Board, require that all local school systems participate in this State evaluation. The Bureau of Evaluation prepared a formal design for this evaluation, which was negotiated with all SEA units involved in the program and accepted by the Bureau of Elementary Education. This latter Bureau administers the State-Funded Compensatory/Remedial Program.

The local evaluations are conducted by the local school systems and submitted to the SEA for presentation to the State Board. However, the Bureau of Evaluation is involved in these local evaluations through several of its other functions. First, as an SEA unit it provides technical assistance in developing program evaluation skills. Second, the Bureau of Evaluation is responsible for carrying out the State Board regulations that require such evaluations to be conducted by an SEA-certified evaluator and to apply the standards for educational evaluations* adopted by the State Board.

*These are the Standards for Evaluations of Educational Programs, Projects, and Materials developed by the Joint Committee on Standards for Educational Evaluation in 1981.
The Bureau of Evaluation developed requirements for local evaluations that were included in the State-Funded Compensatory/Remedial Program regulations, reviewed the local evaluation plans, and will review the final reports for application of the Standards. Figure 1 gives a brief description of these State and local evaluations. It shows the requirement for each, who is responsible for its conduct, and who receives the evaluation report. It also gives a brief listing of the specified content, although neither the State nor the local evaluation is limited to the areas shown on the figure.

Purposes of the Evaluation

The state evaluation serves as the major accountability structure for the State-Funded Compensatory/Remedial Program. One major purpose is to provide policy makers with information about the success of the program in removing skills deficiencies among qualifying students. A second major accountability function is to document compliance with legislation and regulations on the part of the SEA, which administers the program, and the local school systems that implement it.

The evaluation is also intended to provide information that can be used by program planners to improve the quality of the program. Both the SEA and the local school systems will receive reports on the characteristics of relatively more effective programs, strategies school systems have developed in meeting the needs of local situations, and participants' suggestions for improving the structure of the program.

Instructional improvement is the chief purpose of the local evaluations. Each one is different, but they all describe and document three major components: student achievement, coordination of compensatory/remedial services with other elements of the student's education, and the instructional program. The flexibility in local evaluations also allows them to meet purposes defined by the individual school systems.
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**FIGURE 1. OUTLINE OF STATE-FUNDED COMPENSATORY/REMEDIAL PROGRAM EVALUATIONS**
The local evaluations serve several accountability functions. First, they give local audiences information about the success of the programs they report. Second, they provide local school systems with documentation should their findings disagree with the State evaluation. Third, these evaluations are a formal means through which school systems can request changes in the regulations governing the program.

The quality assurance aspect of the local evaluations is designed to improve educational program evaluation. They are a means for ensuring that evaluations are conducted by certified evaluators and apply the State Board-adopted standards.

COORDINATION

Practical as well as procedural constraints required that the evaluations be coordinated with the local school systems and other SEA units in the planning, implementing, and reporting stages. This was due in part to the multi-component nature of the evaluations: although the State and local evaluations were independent, they did involve the same students participating in the same program. Coordination was also needed because other SEA programs were directly or indirectly involved in the State-Funded Compensatory/Remedial Program and because multiple data sources were used for the State evaluation.

Coordination of State and Local Evaluations

The State and local evaluations were independent in several ways.

1. The State evaluation was conducted and reported independently; it did not consist of a compilation of local evaluations or local data.
2. Local school systems developed their own designs, implementation, and reporting for their evaluations.
3. Although the Bureau of Evaluation reviewed them, the local evaluation plans were formally approved as part of each system's Pupil Progression Plan by the State Board.

Coordination of the State and local evaluations was reflected in several other aspects.

1. The Bureau of Evaluation developed the requirements for the local evaluations, including the specified content shown on Figure 1.

2. Local school systems were encouraged to use any information they collected for the State evaluation in their local evaluations.

3. Local school system staff acted as data collectors for the State evaluation.

4. The Bureau of Evaluation provided technical assistance upon request and offered workshops on developing local designs to meet the evaluation requirements, as well as two workshops on evaluation that used the State-Funded Compensatory/Remedial Program as a focus.

Coordination of State Evaluation and Other Programs

As an in-house evaluation unit, the Bureau of Evaluation routinely maintains the integrity of its products by submitting a formal evaluation design and all reports to the Associate Superintendent for Research and Development and the State Superintendent of Education as well as to the staff of the program being evaluated. The State-Funded Compensatory/Remedial Program evaluation required additional coordination in its planning and implementation. Some of the SEA units with major involvement are listed below.

1. The Bureau of Elementary Education. This was the unit responsible for administering the State-Funded Compensatory/Remedial program. Several major points of coordination were:

   - Developing the regulations that included both program and evaluation requirements, and
   - Development and use of forms that were both a part of program administration and a source of evaluation data.

2. The Bureau of Accountability. The Bureau that managed the State BST program provided:

   - Access to BST data for students who qualified for compensatory/remedial instruction (this is treated as secure data by the SEA),
• Generation of customized student reports or records used to collect evaluation data, and

• BST test specifications that were used to develop an evaluation test for the program.

3. The Office of Special Education. This group provided information about regulations affecting those students who qualified for both the State-Funded Compensatory/Remedial Program and special education services.

4. The Office of Federal Programs. This unit similarly provided information about regulations concerning students who qualified for the State program and Chapter 1 services.

5. Office of the Superintendent. In addition to the specified information required by the Superintendent this office was concerned with several other SEA efforts associated with the State-Funded Compensatory/Remedial Program evaluation. Two of the major ones were:

• The relationship between BST performance and grade placement among students qualifying for the program. The BST was required to serve as the principal (but not the only) criterion for promotion in the Pupil Progression Plan developed by each local school system.

• The Superintendent's commitment to reduce the amount of paperwork required by the SEA from local school systems. All reporting required in the administration and evaluation of the State-Funded Compensatory/Remedial program was closely scrutinized and weighed before it was approved.

AUDIENCES AND INFORMATION NEEDS

Figure 2 outlines the major audiences and their primary evaluation information needs for both the State and local evaluations. The chart is limited to those audiences and types of information with an immediate impact upon the scope and form of the program. As a result, it does not include some important audiences, such as parents, whose decisions would have a more indirect influence upon the future of compensatory/remedial education. The planned information needs, those that were drawn from legislation and regulations and included in the formal evaluation design, are indicated in capital letters. Secondary information needs that emerged during the conduct of the evaluations are shown in lower case letters. The figure is further subdivided into the State and local evaluations, and
### STATE EVALUATION

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### Related SEA Units

- **Accountability**
  1) Maintain legitimacy of BST

- **Special Education**
  1) ARP & services
  2) Effect on student IEPs
  1) Use of special education teachers

- **Chapter I**
  1) Supplant
  2) Effect on Chapter I services
  1) Use of Chapter I teachers

### Local School Systems

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**Figure 7. Major Audiences and Information Needs**
the needs associated with program objectives and program implementation within these. The audiences and information needs are treated briefly in this section because they are given full discussion later.

The information needs of the State Legislature were all considered planned (as defined in Figure 1) in that they were specified in the State-Funded Compensatory/Remedial Program's enabling legislation. The Board of Elementary and Secondary Education had some secondary needs through its role in approving the program regulations and program plans in the Pupil Progression Plans, and through its regulations concerning educational evaluations. The Superintendent of Education and the SEA administrative unit were concerned about the effect of the program on student mastery of the State basic skills as well as local compliance with the law and the program regulations the SEA was charged with implementing. These groups were also concerned with the effects of the program regulations on local school systems because of the need to protect ongoing working relationships and to provide technical assistance when needed.

Three other SEA programs are included in Figure 2. These became involved in the program or its evaluation as it became obvious that the program had some impact on their operations. These programs had not been specified as audiences in the evaluation design.

The BST qualified students for the State-Funded Compensatory/Remedial Program and was considered the ultimate measure of the program's effect on skill mastery and future school success. This provided the Bureau of Accountability with a vested interest in the State evaluation. The involvement of Chapter I came about through a request from local school systems that Chapter I teachers be allowed to provide compensatory/remedial instruction to students who qualified for both programs. Special Education was also concerned about the effects of multiple participation and requests that special education teachers be permitted to provide
compensatory/remedial services, but had an additional interest. The BST was to be administered only to students attempting the State minimum standards. Hence, special education students who were in an alternative to regular placement and by definition not addressing the minimum standards were not tested with the BST and did not qualify for the State-Funded Compensatory/Remedial Program. However, some students were classified as special education, alternative to regular placement, after taking the BST and qualifying for compensatory/remedial services. The Bureau of Elementary Education ruled that local school systems did not have to provide compensatory/remedial instruction to these students. The Office of Special Education wanted to ensure that all special education students received the full range of services for which they were eligible.

Local school systems were involved with the State evaluation as it reflected their compliance with the State regulations. Budget expenditures and the number of students served were the only information reported by school system in the State evaluation report. The evaluation design interpreted the requirement to identify the most effective programs as the need to measure the relative effect of broad program variables such as scheduling (in-class versus pull-out versus extended day) of program services. As a result, identifying the most effective program did not involve ranking or otherwise comparing school systems. The requirements for the local evaluations meant that they had to provide audiences within the school system with information about student skills mastery. The local evaluation also gave the school systems the opportunity to weigh the success and difficulties encountered in implementing the State program regulations. There were doubtless other information needs met by the local evaluations, but these cannot be specified here since each evaluation was different.
ISSUES IN MANAGING THE EVALUATIONS

The management issues that arose in the State and local evaluations were primarily due to the interaction of the coordination and information needs already discussed. Most of these issues involved the secondary information needs. It is assumed in this paper that many of these issues would be generic to any large, multi-component evaluation of a comprehensive program in its initial year.

Maintaining Legitimacy

The State evaluation frequently relied on data provided by other SEA units and originally collected for purposes other than the evaluation. This added to the quality of the evaluation, since the accuracy and usefulness of the information was increased by the process of reconciling data from all of the different sources. However, it also raised the potential problems of using information out of context or changing its interpretation. Very few findings could be presented or explained simply. A few instances of these difficulties are given below.

1. Maintaining credibility of the State testing program. The BST was initiated in 1982 after several years of careful work to ensure its technical quality and professional acceptance. For this reason it could not be used as an evaluation instrument, since that would raise problems of test security and possible over-familiarity among qualifying students. SEA use of a different test for evaluation purposes would have to avoid comparison with the BST since the two instruments, and their purposes, differed.

2. Establishing credibility of the evaluation test. The evaluation was required to provide information about student mastery of the State minimum standards. There was no commercially available test that measured all of these, and the Bureau of Evaluation was forced to develop its own test through an item banking service. Developing a credible measure without making unwarranted technical claims was an issue.

3. Technical distinctions. The program regulations required remediation of only deficient skills for each student, and defined these as skills on which the student answered fewer than three of
the four relevant items correctly on the BST. Because of technical considerations of item reliability, the Bureau of Accountability was very careful to avoid distinguishing between "deficient" and "nondeficient" skills in such a manner. This was a difficult point to make in reporting.

4. Complexity in interpreting findings. The BST's role in promotion was an example of this. The test was to serve as the principal, but not sole, criterion in the local Pupil Promotion Plans that determined the procedures for promoting or retaining students. The simplified public interpretation of this was something like "the BST would stop social promotion." Evaluation data showed that students who qualified for compensatory/remedial services were about as likely to be promoted to grade 3 as retained in grade 2. This was because school systems were more likely to promote the qualifying students who had less extensive deficits and because many Pupil Progressions Plans also considered factors such as the number of years' retention in one grade in making promotion decisions. Such findings were difficult to report accurately and understandably in a manner that did not damage other programs.

Balancing Needs of Other Programs

Coordination required a balance between activities needed in order to carry out the State evaluation and to further other SEA efforts. A single issue in this area is discussed here: weighing data needs and the burden on local school systems. This affected the evaluation in two instances.

1. The State Board was concerned about the extent of student testing and required the Bureau of Evaluation to test only a sample of compensatory/remedial students. While the resulting sample was technically adequate for the State as a whole, it was not large enough in any single school system to allow that system to use the compensatory education evaluation test as a major measure of student skill mastery.

2. The Bureau of Evaluation developed a form for the Bureau of Elementary Education to use in its monitoring site visits. This was to have the dual purpose of providing compliance information for the program administration and furnishing evaluation data. The original plan was to have each school system verify and complete information and return the completed form to the SEA before the site visit. These forms would then provide the sampling frame for the evaluation's data collection and required information for the interim evaluation report that was due before all of the monitoring visits would be completed. However, to reduce paperwork, school systems were told not to complete the form in advance, but to use it as a checklist of what would be covered during the monitoring.
As a result, it could not be used by the Bureau of Evaluation in the manner planned. The evaluation relied on older reports, verified by telephone with the 66 school systems, for sampling and reporting purposes.

Use of Evaluation Information

The secondary information needs were those that developed during the implementation of the program. By definition, these were not included in the evaluation design. They also involved, in some cases, other SEA programs that did not have a clear, preplanned role in the State-Funded Compensatory/Remedial Program.

1. Undefined responsibility. At the request of several local school systems, the SEA program administrators approached the SEA Chapter I administration to request permission for Chapter I teachers to provide compensatory/remedial services to students who participated in both programs. Chapter I agreed that this did not constitute supplant and the Bureau of Elementary Education worked with Chapter I to develop procedures through which local Chapter I programs could provide remediation and be reimbursed from State-Funded Compensatory/Remedial program funds. However, R.S. 17:394-400 specifically restricted the program from supplanting any other local, State, or federal remedial funds. The evaluator felt strongly that the working relationship with Chapter I needed to be more fully examined to determine if Compensatory/Remedial Program funds were supplanting Chapter I moneys. However, the program administration felt comfortable with the assurance that Chapter I funds were not supplanting those of the State-Funded Compensatory/Remedial Program and did not pursue the issue further. There was no other group that was appropriate for the evaluation to approach to which the question could be taken.

2. Lack of working relationships. It has been noted that some students who qualified for the program on the basis of their BST scores were subsequently classified as special education, alternative to regular placement, and not provided with compensatory/remedial services. This decision was made by the SEA program administration. In this case there was a legitimate channel through which the Bureau of Evaluation could refer the information to the Office of Special Education. One of the Bureau's positions was a staff person who served as a full-time liaison for policy and procedural issues between the Office of Special Education and the State basic skills testing program. This evaluator, together with an evaluator assigned to the State-Funded Compensatory/Remedial Program, prepared a report on the alternative to regular placement students and submitted it to the Bureau of Elementary Education and the Office of Special Education. However, there was no prespecified relationship.
between these two units for decisions affecting students in the Compensatory/Remedial Program, and the issue will not be resolved in time for these students to be provided compensatory/remedial services (if that is the ultimate decision) during the 1982-83 school year.

Dual Role of the Evaluation Unit

The Bureau of Evaluation was responsible for carrying out the State evaluation and maintaining quality assurance for the local program evaluations. In these roles the Bureau managed local participation in the State evaluation, implemented the State Board regulations for program evaluations, and provided technical assistance to local school systems. Both the State-Funded Compensatory/Remedial Program evaluations and the quality assurance efforts were new efforts, and they were at times confusing to local school system staff.

1. Confusion between technical assistance and regulations. The same SEA evaluation unit, and frequently the same staff, were associated with technical assistance and implementing the requirements for local evaluations. The Bureau attempted to walk a fine line between these two roles. For example, it provided examples of data collection instruments as well as workshops and individual help in developing such instruments, but refused to develop standardized forms that could be used by local school systems. This could cause some confusion. In November 1982, the Bureau and a group of large city evaluators offered a workshop on evaluation that used the Compensatory/Remedial Program as a focus. The two-day workshop was a comprehensive treatment of program evaluation. Some participants left with the mistaken idea that they were required to conduct an evaluation as thorough as the one that had been presented as a teaching model. The confusion was corrected by a letter from the SEA stressing that the local evaluations needed to follow only the plans presented in the local Pupil Progression Plans.

2. Confusion between program evaluation and administration. The evaluation unit worked closely with the program administration in developing administrative regulations and ways in which instrumentation could provide data to both groups. This made it easy for local school system staff to become confused about which SEA staff persons could make administrative decisions. They would call the evaluation unit, for example, with questions about which students were to be served or what kinds of expenditures were allowable. Particularly in the early months of the program, it was necessary to stress the differences between "evaluation" and "program" questions. The evaluation unit staff had to remain very cautious about making informal remarks that could be misconstrued as official SEA opinions and procedures.
Quality Assurance in Mixed Data Sources

The State-Funded Compensatory/Remedial Program only involved some 6,000 students. However, it operated in all of the State's 66 public school systems and required three separate general reports (summer school, interim spring data for the legislature, and end of regular year program) as well as several subsidiary reports. The data for these reports came from a variety of sources, and frequently the same information was presented in more than a single report. In the latter case all of the data had to be updated and reconciled with earlier findings. This is a common problem in any longitudinal study, but one that is compounded when data are drawn from different sources.

1. Reconciling different data sources. As an example, figures on the number of qualifying students were initially drawn from the spring, 1982, BST tapes. These reflected the schools in which the students were tested. These figures were later modified as some children were disqualified because they were special education students who should not have been tested and others were "requalified" as their disqualification status was appealed. Local school systems were asked to correct this qualification data in October, 1983. The Bureau of Evaluation had to track each student in these data who had transferred to another school in the system, moved, or been classified as special education, alternative to regular placement. The numbers of students qualifying for, and served by, the program were again reported in the interim spring, 1983, report. At that point, when BST figures, local school system reports, and Bureau of Elementary Education budget allocations were reconciled, 43 of the initial 6,243 students could not be accounted for in reporting. Fiscal information was almost equally difficult to reconcile.

2. Quality of data. Because of the size of the evaluation, local school systems acted as data collectors in administering evaluation tests and distributing survey instruments to teachers. Some student data were missing from the tests, as well as from the Student Profile Forms maintained for each participating student. And, while there is no indication that the evaluation tests were used improperly, the evaluation cannot guarantee that they were administered correctly or that they remain secure. This will remain a potential problem in the State evaluation.

CONCLUSIONS

The issues that have been discussed in this paper are ones that occurred in the first year of Louisiana's State-Funded Compensatory/Remedial Program.
evaluation. Similar problems could arise in any evaluation that is as large and closely integrated with other SEA programs and activities as this one, particularly in the initial year of a program. It would be a mistake to ignore the benefits of such large (and occasionally frustrating and labor-consuming) evaluations.

The audiences wanted the information and, except for the few instances noted here, used it. This is extremely gratifying to any evaluator. After hearing the summer school report, the State Board requested an additional report on special education students who had participated in the summer school program. Both the Bureau of Accountability and the Bureau of Elementary Education routinely include evaluation staff in their presentations when the State-Funded Compensatory/Remedial Program is discussed, and all of the evaluation findings are presented to the State Superintendent of Education's cabinet.

Both the State and local evaluations have proved an excellent means for increasing local school system staff skills in program evaluation. Good cooperative working relationships have been established between the SEA and the local systems. Requests for workshops and technical assistance have increased, and group conferences are well attended. More than 100 local evaluators and program administrators took part in the November, 1982, evaluator training. Some school systems allocated part of their State-Funded Compensatory/Remedial Program money to program evaluation. Tests and survey instruments were administered and returned in time; the local school systems were conscientious about administering them, and returned comments about the quality of the instruments.

In short, evaluations that involve programs and individuals outside the evaluation unit become complex. The complication is increased when other SEA programs and efforts beyond that being evaluated enter in. However, there are benefits that probably outweigh the difficulties and that could not be gained through other means.
ABSTRACT

ACCOUNTABILITY USES OF A STATEWIDE COMPENSATORY EDUCATION PROGRAM EVALUATION

Louisiana's State-Funded Compensatory/Remedial Program requires two different evaluations: a study of the statewide program and local evaluations conducted by the 66 public school systems involved in the program. The SEA evaluation unit is responsible for 1) conducting the statewide evaluation and 2) exercising quality assurance over, and providing technical assistance to, the local evaluations. State Board of Education policy requires that both evaluations apply the Standards for Evaluations of Educational Programs, Projects, and Materials. This paper is written from the point of view of evaluation management and discusses the accountability uses of the processes and information for statewide and local evaluations. It identifies the organization and management relations developed to carry out the evaluations and discusses the issues arising in implementing evaluations that affect more than a single program or organizational unit. The issues discussed include maintaining the legitimacy of the evaluations and other SEA efforts, balancing the needs of other programs, using the evaluation information, balancing the dual role of the SEA evaluation unit, and assuring quality in the evaluation.