AEA 2014 Professional Development Workshops

Join us for a pre- or post-conference professional development workshop at Evaluation 2014, the annual conference of the American Evaluation Association, to be held October 15-18, 2014. Click here to access more information about the conference and to register online.

Workshop 1 Logic Models for Program Evaluation and Planning

Monday, Oct 13, 2014 (09:00 AM - 04:00 PM)

Many programs fail to start with a clear description of the program and its intended outcomes, undermining both program planning and evaluation efforts. The logic model, as a map of what a program is and intends to do, is a useful tool for clarifying objectives, improving the relationship between activities and those objectives, and developing and integrating evaluation plans and strategic plans.

First, we will recapture the utility of program logic modeling as a simple discipline, using cases in public health and human services to explore the steps for constructing, refining and validating models. Then, we will examine how to improve logic models using some fundamental principles of "program theory," demonstrate how to use logic models effectively to help frame questions in program evaluation, and show some ways logic models can also inform strategic planning. Both days use modules with presentations, small group case studies and debriefs to reinforce group work.

Learning Outcomes:
• To construct simple logic models;
• To use program theory principles to improve a logic model;
• To identify and engage program stakeholders using a logic model;
• To develop an evaluation focus based on a logic model;
• To use logic models to guide strategic planning and strategy setting.
Level: Beginner

Thomas Chapel is the central resource person for planning and program evaluation at the U.S. Centers for Disease Control and Prevention and a sought-after trainer. Tom has taught this workshop for the past several years to much acclaim.

Workshop 2 Presenting Data Effectively: Practical Methods for Improving Evaluation Communication

Monday, Oct 13, 2014 (09:00 AM - 04:00 PM)

Crystal clear reports, slides, and graphs are valuable – they save an audience's mental energies, keep a reader engaged, and make you look smart. In this workshop, attendees will learn the science behind presenting data effectively and will leave with direct, pointed changes that can be immediately administered to their own conference presentations and other evaluation deliverables. Beyond the scope of the conference, this workshop will address principles of data visualization, slideshow, and report design that support legibility, comprehension, and retention of our data in the minds of our clients. Grounded in visual processing theory, the principles will enhance attendees' ability to communicate more effectively with peers, colleagues, and clients by focusing on the proper use of color, arrangement, graphics, and text in written evaluation documents. Attendees are strongly encouraged to maximize the workshop experience by bringing printouts of graphs, slides, and reports under current construction.

Learning Outcomes:
1. Visual processing theory and why it is relevant for evaluators
2. Graphic design best practices based in visual processing theory
3. How to apply graphic design best practices and visual processing theory to enhance data visualizations with simple, immediately implementable steps
**Prerequisites:** Registrants should regularly develop graphs, slideshows, technical reports, and other written communication for evaluation work and be familiar with the navigational and layout tools available in simple software programs, like Microsoft Office.

**Level:** Intermediate

**Stephanie Evergreen** holds a PhD from Western Michigan University in interdisciplinary evaluation, which included a dissertation on the extent of graphic design use in written evaluation reporting. Within the American Evaluation Association, Stephanie founded the topical interest group on data visualization and reporting. She also leads the first known initiative to change the culture of presentation within a professional association, AEA’s Potent Presentations Initiative. She is co-editor and co-author of two issues of *New Directions for Evaluation* on data visualization with Tarek Azzam. She regularly blogs on data presentation. Her book, *Presenting Data Effectively: Communicating Your Findings for Maximum Impact*, was published by Sage in Fall 2013 and was #1 in Social Science Research on Amazon in both the US and the UK for several weeks.

---

**Workshop 3 Developmental Evaluation: Applying Complexity Concepts to Enhance Innovation and Use**

Monday, Oct 13, 2014 (09:00 AM - 04:00 PM)

Developmental evaluation (DE) is especially appropriate for innovative initiatives or organizations in dynamic and complex environments where participants, conditions, interventions and context are turbulent, pathways for achieving desired outcomes are uncertain, and conflicts about what to do are high. DE supports reality-testing, innovation and adaptation in complex dynamic systems where relationships among critical elements are nonlinear and emergent. Evaluation use in such environments focuses on continuous and ongoing adaptation, intensive reflective practice and rapid, real-time feedback. The purpose of DE is to help develop and adapt the intervention (different from improving a model). This evaluation approach involves partnering relationships between social innovators and evaluators in which the evaluator's role focuses on helping innovators embed evaluative thinking into their decision-making processes as part of their ongoing design and implementation initiatives.

Through lecture, discussion and small-group practice exercises, this workshop will position DE as an important option for evaluation, in contrast to formative and summative evaluations as well as other approaches to evaluation.

**Learning Outcomes:**• The specific niche for which developmental evaluation is appropriate and useful;
• Five types of DE and the implications of those types;
• The dimensions of complexity that affect how DE is;
• Practical frameworks and innovative methods for use in DE.

**Prerequisites:** None

**Level:** Beginner

**Michael Quinn Patton** is an independent consultant and professor at the Union Institute. An internationally known expert on Utilization-focused Evaluation, this workshop is based on his seminal book, "Developmental Evaluation: Applying Complexity Concepts to Enhance Innovation and Use" (Guilford, 2010).

---

**Workshop 4 Actionable Evaluation**

Monday, Oct 13, 2014 (09:00 AM - 04:00 PM)
This workshop is the antidote to evaluations that get lost in indicators, metrics, observations, and stories. If evaluation feels more like a measurement or opinion-gathering exercise; if you wonder if there’s something clearer and more valuable you could be delivering for decision makers, then this workshop is for you. This workshop covers the following: • Big-picture thinking about key stakeholders, their information needs, and the evaluative questions they need answered • A hands-on introduction to evaluative rubrics as a way of directly answering those questions, especially when there are a lot of 'intangibles' to capture • Guidance for designing interview and survey questions that are easier to interpret against evaluative rubrics • A reporting structure that gets to the point, delivering direct, actionable answers that decision makers can really use (not just a laundry list of recommendations)

Learning Outcomes: How to write a set of big-picture overarching questions to guide the evaluation How to use evaluative rubrics to get direct, evaluative answers to these questions, especially when there are 'intangibles' to capture How to design interview and survey questions geared directly toward answering evaluative questions Evaluation conceptualization and reporting tips that maximize the chances of a clear, to-the-point, and actionable evaluation

Prerequisites: Some experience with doing, using, or commissioning evaluation.

Level: Beginner

Dr. Davidson runs her own successful evaluation coaching, training, and consulting practice, Real Evaluation Ltd, which offers evaluation workshops and professional development as a key part of her services. She has led successful workshops in the past for AEA, CES, AES, TEI, anzea, and UNISA, as well as numerous workshops tailored to specific organizations' needs. Prior to returning home to New Zealand, Jane led and taught the core evaluation courses in Western Michigan University's Interdisciplinary PhD in Evaluation

Workshop 5 Eval 101

Monday, Oct 13, 2014 (09:00 AM - 04:00 PM)

This workshop is designed to introduce new evaluators and people who may be responsible organizationally for evaluation to the processes of thinking about, planning, implementing, and reporting an evaluation across a variety of settings. A central focus of the workshop is the inclusion of issues related to ethical evaluation practice, cultural competency, and evaluation thinking, purposes, planning processes, and use of standards for good evaluations. Participants will learn a framework for designing the evaluation from problem identification to use and will have the opportunity to apply this framework to a case study. A combination of brief didactic presentations and small group work will be used throughout the workshop.

Learning Outcomes: • Demonstrate ways to 'think' like an evaluator, including the influence of an ethical and culturally responsive lens on evaluation thinking • Identify the driving forces for committing to conduct a meaningful evaluation from the perspectives of multiple stakeholder groups, including those from marginalized communities • Apply a six-step framework for conceptualizing, implementing, reporting, and using evaluations from a variety of perspectives, including those that emphasize social justice and human rights • Identify, respect, and incorporate contextual influences into the evaluation design in culturally appropriate ways

Prerequisites: None

Level: Beginner

Mertens has over 30 years of experience in the delivery of workshops and seminars focused on all facets of program evaluation. Over the last 35 years, she has presented at AEA and other evaluation association meetings. Mertens offered 'Evaluation 101' at AEA in 2012 and 2013 as a sole presenter and in 2011 in conjunction with John McLaughlin who presented the workshop for nearly 12 years. Mertens has revamped the
presentation for 2014, adding a common vocabulary list, evaluation examples from various sectors, and a template for logic model development.

**Workshop 6 Reality Counts: Participatory methods for engaging marginalized and under-represented persons in M&E**

Monday, Oct 13, 2014 (09:00 AM - 04:00 PM)

Many evaluators find their toolkit of methods is inappropriate or ineffective in gathering accurate, reliable, valid, and usable data from persons who may feel vulnerable, powerless, or disenfranchised. Attributes such as low-literacy and numeracy skills, gender, social-economic status, cultural identity, immigration status, or physical disability tend to silence some and leave them out of typical evaluation processes. This workshop will demonstrate and practice methods based on participatory rural appraisal and the more inclusive participatory learning and action family of methodologies that can engage and empower program participants throughout the entire program cycle – from needs assessments, design, monitoring, evaluation questions and design, data collection, interpretation, and analysis, to communicating results with stakeholders. Participants in this highly interactive workshop will learn how to promote evaluations that are culturally relevant and come away with several techniques that can be adapted and used in different contexts and disciplines with marginalized persons in the west or less developed countries.

**Learning Outcomes:**
- Some common and specific challenges in gathering program needs assessment and evaluation data from persons with limited resources, reading and numeracy skills, or power
- Why participant characteristics such as income, education and gender can influence data collection methods, quality, reliability, and validity
- How to adapt and use several practical evaluation methods for working with the above persons in different contexts, disciplines, and purposes.
- How to discuss with and translate for program evaluation clients (sponsors) the validity of participatory methods and appropriate outcome indicators for disenfranchised program participants
- Resources available for participatory methods for the intended population
- How the demonstrated methods can contribute to the empowerment of vulnerable and marginalized populations, increase ownership and sustainability of programs, and improve the overall quality of monitoring and evaluation systems

**Prerequisites:** Experience working in limited resource environments with marginalized or under-represented communities preferred, understanding of adult learning theory and some experience with data interpretation and analysis.

**Level:** Intermediate

**Dr. Tererai Trent** has more than 20 years of international experience in facilitating participatory PM&E. Born and raised in rural Zimbabwe, Dr.Tererai brings together evaluation perspectives and viewpoints from both the developing and developed world. In Zimbabwe, Dr.Tererai was selected as one of the lead PRA facilitators for one of the PRA networks in the region. As a PM&E Deputy Director for Heifer International, Dr.Tererai facilitated the organization's field logic model which guided all the country program's PM&E activities. She trained program staff in several countries on how to fully engage low-literacy communities. Dr.Tererai also facilitated Heifer International's strategic plans in more than 15 countries worldwide.

**Dr. Mary Crave** has been an extension educator for about 35 years, training extension practitioners, program staff, and university professors in the U.S. and internationally in program development, teaching, evaluation, grant-writing, and other skills. She has taught these workshop evaluation methods in many African and Central American countries to program managers, men's and women's farm groups, youth, teachers, women's cooperatives, and extension officers. She consistently receives high ratings on her teaching skills and is sought out by USDA, other programs funders, and extension educators for her guidance on training methods. She has developed train-the-trainer manuals and workshops for community nutrition, school gardens, community leadership, cultural awareness, and family and consumer sciences contexts.
Kerry Zaleski, MPH has been working in the field of international health and development for almost 15 years and in the non-profit/health and social service sector in the U.S. for almost 10 years. She has designed and implemented training and continuing education courses for home care aids, youth counselors, and health care workers in the U.S., as well as community health and development officers, senior managers, public and private partners, peer educators, and community volunteers in both humanitarian relief and long-term development contexts worldwide. She has extensive experience using the training-of-trainers approach and developed manuals, guidelines, check-lists, tool kits, and monitoring forms to support program teams. Like her co-facilitators, her facilitation style is reflective of adult learning theory and borrows from a variety of participatory, empowerment, and interactive learning concepts. She has adapted exercises from models such as Stepping Stones, PHAST, and Participatory Learning and Action to particular context and purpose.

Workshop 9 A Framework for Developing and Implementing a Performance Measurement System of Evaluation

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

Description: Funders are increasingly emphasizing the importance of evaluation, often through performance measurement. This workshop teaches participants how to develop high quality project objectives and performance measures, which are critical to both good proposals and successful evaluations. Participants will increase their understanding of the relationships between project activities and intended program outcomes and base appropriate measures for each. This knowledge will assist in the development of more sound evaluation designs, allowing for the collection of high quality and meaningful data. Participants will also be given a framework with practical strategies and planning devices that can be used for writing project objectives and measures and planning evaluations focused on performance measurement. The workshop will provide examples and ideas on how to implement a performance measurement system within an organization. This framework is useful for a wide array of programs assessing impact and evaluating program outcomes from both single-site and multi-site studies as well as for locally and federally-funded projects.

Learning Outcomes: Learning Objectives:
• To identify and create measurable, feasible, and relevant project objectives related to evaluation
• To identify and write high quality performance measures that are complete, measureable, practical, and pertinent to the corresponding objective
• To understand the difference between process and outcome measures and to ensure there is a balance between the two
• To see how objectives and performance measures can easily fit into the performance reports required by federal, local, and for profit funders
• To learn how to develop a framework that can be applied to a variety of evaluation settings, which allows for clear, measurable, and agreed upon plan

Prerequisites: Participants should have a basic understanding of evaluation.

Level: Intermediate

Dr. Courtney Brown and Dr. Mindy Hightower King have extensive experience developing and implementing performance measurement systems at local, state, and national levels. They are experienced facilitators and have provided over 20 workshops and lectures to program staff and grantees and individual technical assistance to at least 40 representatives of grant-receiving agencies. They have delivered similar workshops over the past six years for a variety of stakeholders affiliated with foundations, non-profits, local education agencies, state departments of education, and the U.S. Department of Education (USDOE). Workshop participants have included grant applicants, project directors, evaluators, program officers, and USDOE staff. Evaluations have shown that workshop participants are more likely to write proposals that include cohesive project objectives and realistic performance measures after taking Drs. Brown and King’s educational trainings.
Workshop 10 Creating Surveys to Measure Performance and Assess Needs

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

Surveys for program evaluation, performance measurement, or needs assessment can provide excellent information for evaluators. However, developing effective surveys requires an eye for unbiased question design as well as the ability to identify how the results of the survey will be used. This workshop will take participants through the major steps in survey development, administration, and reporting. Topics covered include survey mode selection, sampling, instrument creation, data analysis, and reporting. Specific emphasis will be given to issues of emerging technology—its usefulness and limitations. Many real world strategies will be provided to assist evaluators in study design, instrument creation, and analysis/reporting techniques to help promote data accuracy and usefulness.

Learning Outcomes:
• When to choose a survey verses a focus group, observations, or "big data"
• How to select appropriate survey administration modes, learning both the pros and cons of each mode.
Emerging trends of web surveying and smart devices will be covered
• How to determine the target audience, design a survey sample, and understand the types of biases that commonly affect surveys
• How to reduce non-response and coverage bias through sampling techniques, survey administration tips, and data calibration (weighting).
• How to write survey questions and question response scales.
• Appropriate and innovative ways to analyze and present data to facilitate usefulness.

Prerequisites: Although I have taught the workshop for all levels, there is definitely more to be learned for folks who have conducted a few surveys themselves.

Level: Beginner

Michelle Kobayashi has previously hosted workshops on this topic at two AEA conferences. Her webinar is also being offered in AEA’s Best of 2013 eStudy series. In addition to AEA presentations, over the past 15 years, she has led workshops on evaluation and survey development with hundreds of staff from community-based organizations and local government.

Workshop 11 Introduction to Meta-Analysis

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

This workshop is designed to provide attendees with the knowledge, skills, and abilities necessary to conduct basic research reviews, research syntheses, and meta-analyses. Topics covered include, but are not limited to, the use of meta-analysis in formulating and enacting evidence-based policies and practices; the role of meta-analysis in theory development, principles, and procedures for planning and executing research reviews and meta-analyses; identifying and retrieving literature, coding studies, computing effect sizes (e.g., based on means, binary data, and correlations), and their corresponding confidence intervals for meta-analysis; converting among effect sizes; factors that affect precision (e.g., variance, standard error, and confidence intervals); fixed-effect and random-effects models for meta-analysis; and identifying and quantifying heterogeneity, prediction intervals, subgroup analysis, meta-regression, power analysis for meta-analysis, and publication bias. Attendees will need to bring a laptop computer and have downloaded the trial version of Comprehensive Meta-Analysis 2.0 to participate in the workshop.
Learning Outcomes: • The principles and procedures for planning and executing basic research reviews and meta-analyses
• How to identify and retrieve relevant literature
• How to code studies
• How to compute effect sizes (e.g., based on means, binary data, and correlations) and their corresponding confidence intervals for meta-analysis
• How to convert among effect sizes
• Factors that affect precision (e.g., variance, standard error, and confidence intervals)
• How to execute fixed-effect and random-effects models for meta-analysis
• How to identify and quantify heterogeneity
• How to conduct simple subgroup analyses and meta-regression
• How to estimate publication bias

Prerequisites: Basic knowledge of applied statistics and research design
Level: Intermediate

Dr. Coryn has given numerous lectures, speeches, and workshops, both nationally and internationally, including Albania, Austria, Canada, France, Germany, India, Japan, Macedonia, Nepal, New Zealand, Russia, Switzerland, Thailand, United Kingdom, and United States. From 2010 to 2011, he provided instruction at The Evaluators’ Institute (TEI), held annually in Chicago, Ottawa, San Francisco, and Washington.

Workshop 12 Evaluating and Improving Cost, Cost-Effectiveness, and Cost-Benefit
Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

Evaluating the costs of programs is the missing link between doing a superficial evaluation and doing an evaluation that gets changes made and funding delivered. Evaluating the monetary outcomes of programs can help, too. Once you have measured costs and perhaps benefits, adding cost-effectiveness, cost-benefit, and a cost-utility analysis to your evaluation is just a few more steps. There is a bit more to it than that—-but this is where this skill-building workshop can really help! You will finish this workshop knowing what "cost studies" all too often are, and what cost-inclusive evaluation can and should be. You will see how evaluations that include resources used the program, plus resources generated by the program, can help programs flourish. In addition, you will understand the basic tools for conducting and using several forms of cost-inclusive evaluation in your program and in your decisions.

Learning Outcomes: • What a "cost study" is and can be. More specifically, how to recognize, interpret, and use findings from basic analyses of cost, cost-effectiveness, and cost-benefit
• To design and conduct basic evaluations that include costs of programs as well as the monetary and other universal outcomes resulting from programs, including how to communicate findings from cost-inclusive evaluation in simple graphic as well as numeric modes
• To recognize and avoid or recover from pitfalls common in cost-inclusive evaluations, including political and ethical problems
• To anticipate, understand reasons for, and work with resistance to cost-inclusive evaluation

Prerequisites: None
Level: Beginner

Brian Yates has over three decades of experience providing successful all-day and half-day versions of this workshop within the U.S., Australia, and Romania. Mr. Yates combines the accepted "sage on the stage" approach with a "guide on the side" approach and exercises designed to provide a qualitative understanding of the importance of including resources in evaluation and of resistance to cost-effectiveness and cost-benefit analysis.
Workshop 13 Evaluation Capacity Development (ECD) 101: Theories and Strategies on How to Work with Clients, Communities and Organizations to Enhance Their Evaluation Knowledge and Practice

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

In order to address the existing limitations of the way Evaluation Capacity Development (ECD) is understood and implemented in a variety of settings, this workshop will help participants refine their understanding of the main theoretical foundations and assumptions underlying any ECD efforts. Through the use of case studies and scenario planning, participants in this workshop will develop an intuitive step-by-step process to plan, implement, and evaluate ECD more effectively. The workshop also will offer practical strategies on how to enhance the attitudes and practices toward evaluation among your clients, communities, and organizations.

Learning Outcomes:
- The respective strengths and pitfalls of the most widely used ECB and ECD frameworks in international development;
- The commonalities and differences (and operational implications) existing between Evaluation Capacity Building (ECB) and Evaluation Capacity Development (ECD);
- Effective strategies to address the challenges encountered in their respective ECD efforts;
- How to enhance ECD planning and implementation skills through a new ECD conceptual framework and a 10-step process tailored to their project specific needs and programmatic interests

Prerequisites: None
Level: Beginner

Through his facilitation endeavors and transformative research work, Dr. Tarsilla has been especially focused on enhancing his clients' capacity to track and measure their performance effectively as well as to foster their utilization of evaluation findings and their formulation of evidence-informed and right-based policies. In doing so, Dr. Tarsilla has always made sure to combine his expertise with clarity, compassion, cultural responsiveness, enthusiasm, ethical responsibility, and humor.

Dr. Tarsilla has been the Lead Trainer of evaluation trainings among a variety of U.S. government agencies staff around the world (USAID, MCC and the U.S. State Department) since 2010. Over the years, he has also provided evaluation mentoring to approximately 500 participants. As an Evaluation Capacity Development (ECD) specialist, he has been training government officials, civil society organizations, and individual evaluation practitioners on a variety of evaluation-related topics in over 25 countries between 2000 and 2010. He has conducted ad-hoc workshops for a variety of agencies, including the World Bank, FAO, The Belgian Cooperation, the Gates Foundation, and the African Development Bank. He has also been delivering a series of pre-conference workshops for a variety of professional conferences, including AEA 2013 (mixed methods with Donna Mertens and Evaluation Capacity Development 101), the African Evaluation Association Conference in 2014, the Malaysian Evaluation Associations Conferences in 2014, as well as the ALNAP (Global Network on Humanitarian and Emergency Professionals) Annual Conference in Ethiopia in 2014.

Workshop 14 Evaluability Assessment: What, Why and How

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

Evaluability assessment (EA) is used to determine the readiness of a program for outcome evaluation. EA use is on the rise both nationally and internally with vibrancy in its application across a wide variety of disciplines and programs. Its use has expanded to include formative evaluation, implementation assessment, evaluation planning, program development, and technical assistance. EA is also being used to increase stakeholder involvement, understand program culture and context, facilitate organizational learning, and evaluation capacity building. However, there continues to be ambiguity and uncertainty about the method. Although several EA models exist, the essential elements of EA include focusing the EA, developing a program theory, gathering
feedback on program theory, and using the EA. In this workshop, a modern model of EA will be presented that incorporates the essential elements of EA with current evaluation theory and practice.

**Learning Outcomes:**
- Attendees will learn the essential elements of EA and how they are incorporated in the EA model presented
- Attendees will learn the important benefits and advantages of conducting an EA
- Attendees will learn how to implement the EA model presented

**Prerequisites:** None

**Level:** Beginner

In August 2013, Michael Trevisan and Tamara Walser presented a workshop on evaluability assessment at Claremont Graduate University for the annual Professional Development Series in Evaluation and Applied Research Methods in Claremont, CA. A total of 300 participants registered for this event, with 18 percent in person and 43 percent on-line, while the others viewed the presentation as a webinar. Trevisan and Walser have facilitated dozens of workshops on assessment and evaluation to school teachers and administrators over a 20-year period.

---

**Workshop 15 Multilevel Models in Program and Policy Evaluation**

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

This workshop will cover the following areas relevant to multilevel models: An intuitive introduction to multilevel models; examples of multilevel models in program evaluation; have the multilevel models increased our understanding by which programs work?; using multilevel models to explicate program theory; potential applications of multilevel models to education, health and international development projects; role of multilevel models in testing program theory; and recent developments in multilevel models software applications: example of implementing multilevel models in SPSS and other software.

**Learning Outcomes:**
- The basics of multilevel modelling
- When to use multilevel models in your evaluation practice
- How to implement models using widely available software
- The importance of considering multilevel structures in understanding program theory

**Prerequisites:** Knowledge of some statistics will be an advantage.

**Level:** Intermediate

Sanjeev Sridharan has taught and presented on statistical topics to a wide variety of audiences including university students, program practitioners, policy makers, and faculty development workshop. Additionally, Sanjeev has taught in diverse countries including the U.S., UK, Nepal, and Sri Lanka. This workshop was presented at numerous AEA Annual Conferences and a version of this class was presented to UNICEF staff in Kathmandu, Nepal.

---

**Workshop 16 Developing Monitoring and Evaluation Frameworks**

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

Monitoring and Evaluation (M&E) Frameworks are increasingly important for developing an agreed approach to the assessment of results achieved and to aid organizational learning. The M&E Framework identifies expected results, key evaluation questions and the means to answer these questions through routine monitoring and periodic evaluation. Monitoring and evaluation functions are essential to the effective operation of initiatives and
programs and will contribute to the overall value derived from them by supporting decision-making, allocation of resources, and program refinement based on lessons learned.

This workshop will present a clear and staged conceptual model for the systematic development of an M&E Framework. It will examine a range of steps and techniques involved in the design and implementation of the framework and explore potential design issues and implementation barriers; cover the development of a Program Logic, the identification of key evaluation questions, and the development of performance indicators; and identify the processes for on-going analysis and reflection based on data generated.

**Learning Outcomes:** You will learn:

- The stages and steps involved in the development of a Monitoring and Evaluation Framework
- Means to promote a participatory approach to the design and implementation of a Monitoring and Evaluation Framework
- Strategies to address common challenges and issues faced in the design and implementation of a Monitoring and Evaluation Framework

**Prerequisites:** Ideally participants will have a working knowledge of program theory and program logic and some experience in undertaking program evaluations.

**Level:** Intermediate

Anne Markiewicz and Ian Patrick are both highly experienced workshop facilitators. Both have academic backgrounds with expertise in teaching and training. Anne Markiewicz and Ian Patrick have presented this workshop extensively in the United Kingdom, Australia, and New Zealand. This workshop is returning to AEA’s Annual Conference, due to positive feedback from 2013 participants.

---

**Workshop 17 Identifying unanticipated outcomes of international development programs**

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

This workshop will address the question "Why do so many development evaluations fail to identify unintended outcomes?". This question has frequently been ignored in both evaluation literature and practice. In particular, the workshop will cover the following topics: 1. Definition of unintended outcomes of international development programs 2. Examples of the failure of many evaluation designs to identify unintended consequences 3. Reasons why conventional evaluation methodologies fail to capture unintended outcomes (e.g., Randomized Controlled Trials and most quasi-experimental evaluations are only designed to estimate the extent to which intended outcomes are achieved) 4. The (often very serious) consequences of ignoring unintended outcomes 5. Case studies: examples of how randomized control trials fail to identify unintended outcomes 6. Ways to strengthen the ability of evaluations to identify unintended consequences. These include maximizing the use of mixed methods; strengthening theories of change; building in contextual analysis, results chains, analysis of mechanisms, and behavioral processes; and use of configurational case study methods.

**Learning Outcomes:**

- The importance of unintended outcomes and the often serious results of ignoring them
- Why many evaluation designs fail to capture these outcomes
- The equity implication of not capturing unintended outcomes as it tends to be the poorest and most vulnerable groups who suffer the consequences.
- To make participants aware of the need to adopt an "eyes wide open" approach to evaluation and to "think outside the evaluation box". It is important to avoid the common situation in which the local population is aware of the sensitive political and cultural context within which the program operates, but the evaluator has no knowledge of these realities.
**Prerequisites:** Participants should possess direct field-work experience conducting evaluations and be familiar with the most widely-used impact evaluation methodologies.

**Level:** Intermediate

**Michael Bamberger** has extensive experience in evaluation training. He has organized two workshops each year since 2001 at the International Program for Development Evaluation Training (IPDET) at Carleton University for approximately 1,000 participants. For five years, he served as the World Bank (EDI) Training Coordinator for Asia. He coordinated an average of five evaluation-related training programs per year for senior officials throughout Asia. He has also organized evaluation workshops for UNDP, UNICEF, DFID, ADB, AfDB, ESCAP, SIDA, NORAD and the World Bank.

**Michele Tarsilla:** Since 2010, Michele Tarsilla has served as the Lead Trainer of evaluation trainings (1 and 2 weeks in duration) among a variety of U.S. government agencies staff around the world (USAID, MCC, and the U.S. State Department). He has also provided evaluation mentoring to approximately 500 participants. As an Evaluation Capacity Development (ECD) specialist, he has been training government officials, civil society organizations, and individual evaluation practitioners on a variety of evaluation-related topics in over 25 countries. He has conducted ad-hoc workshops for a variety of agencies, including the World Bank, FAO, The Belgian Cooperation, the Gates Foundation and the African Development Bank. He has also been organizing several workshops for a variety of professional conferences, including AEA (mixed methods with Donna Mertens and Evaluation Capacity Development 101), the African and the Malaysian Evaluation Associations Conferences as well as the ALNAP (Global Network on Humanitarian and Emergency Professionals) Annual Meeting in Ethiopia. He will be facilitating a workshop on ECD at the International Program for Development Evaluation Training (IPDET) at Carleton University in June 2014.

**Workshop 18 Focus Group Research: Planning, Implementing and Facilitation**

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

As a qualitative research method, focus groups are an important tool to help researchers understand the motivators and determinants of a given behavior. Based on the seminal works of Richard Krueger and David Morgan, this course, utilizing a combination of lecture and small group work, will provide a practical introduction to planning and conducting focus group research, including hands on practice with focus group facilitation. Participants will be actively encouraged to ask questions throughout the session as well as share any insights they have gleaned from previous experience.

**Learning Outcomes:**
- How to identify and discuss critical decisions in designing a focus group study, including expected benefits and appropriateness for the needs of the research
- How research or study questions influence decisions regarding segmentation, recruitment, and screening
- How to identify and discuss different types of analytical strategies and focus group reports including top-line summaries and full narrative reports
- How to identify and use best practices for facilitating focus groups

**Prerequisites:** None

**Level:** Beginner

**Michelle Revels** has taught a shortened version of this workshop for the last seven years at the AEA/ CDC Summer Intensive as well as for the AEA conference in 2006. For the past two years, she has taught a full day version of the workshop at the annual AEA conference as well as delivered it as a two part eStudy for AEA. This year, Michelle Revels has asked two of her colleagues, who are seasoned focus group moderators, to join her in presenting a newly expanded two-day version of the workshop. Both of the co-facilitators have led several trainings on focus group moderation and group facilitations for ICF staff.
Workshop 19 The System - The Structure - The Program - An SNA Perspective

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

What does a system look like? The programs we evaluate are systems. Systems are structures that have flows of information, pathways for getting resources, and hierarchies for decision-making. Programs are systems at work. Programs build structures based on a variety of connections between all participants. What a structure looks like is critical to program success. Knowing the structure of a program answers questions like does this program have the capacity to succeed, who has the most influence, who holds the key to finding resources, who is not in the loop, where do decisions get made, and are these decisions based on information found in the structure? Social Network Analysis is the methodology for exploring structures. The purpose of this pre-session is to build knowledge and skills about SNA, through a hands-on-demonstration, which will explore how SNA measures and tools identify, clarify, and quantify program structures.

**Learning Outcomes:**
- Identify and locate in UCINET 6 the DL formats for importing data through the spreadsheet editor
- Create SNA data layouts in Excel from typical survey data
- Create a template for data checks and record keeping of UCINET 6 files
- Explain the conceptual differences between centrality measures, such as degree centrality, betweenness centrality, eigenvector centrality, closeness reach, and flow centrality and how to do significance testing with the appropriate measures
- Create reporting charts and tables on centrality measures to identify most important individuals within the network, individuals who are key players, hubs, etc.
- Create an attribute table based on both demographic attributes of members of the network and the results of the centrality measures.
- Identify on sociograms, individuals identified in the reporting charts and tables
- Using hands on materials, to create a sociogram that represents a coding scheme they have developed from their attribute table

**Prerequisites:** Participants should have a sound foundation and experience in doing program evaluation, and logic models. Participants can bring laptop computers with UCINET installed to follow along, although they do not have to have familiarity with the program.

**Level:** Intermediate

Maryann Durland has been consulting on and doing SNA work in evaluation since 1990. She has done workshops for AEA as well as for various clients. This workshop was previously presented at an AEA Annual Conference, but this year the participants will be placed in a smaller group.

Workshop 20 Introduction to the Art of Hosting: Applying Participatory Leadership And Facilitation Techniques In Evaluation

Tuesday, Oct 14, 2014 (09:00 AM - 04:00 PM)

Participatory facilitation methods are currently at the forefront of organizational development and evaluation practices. Even unintentionally, decisions about programming and evaluation are laden with taken-for-granted organizational dynamics and decision-making processes. As evaluators, we can overcome limitations in data collection and analysis (e.g. time, languages, complexity, and diversity of stakeholders) by using participatory facilitation techniques and increasing our ability as evaluators to sense, listen, and recognize both the dynamics in the room and the common threads among seemingly conflicting voices. We can model for organizations
productive, meaningful, fruitful, and action-driven decision-making and evaluation processes. In this workshop, participants will experience four technologies (Pro-Action Café, Open Space, Teach-in, and Circle Practice), learn to recognize four facilitation skills (sensing, synthesizing, holding space, and pausing to discuss processes and/or group dynamics), and discuss adaptations that can be made to meet a variety of needs for evaluation and organizational development.

**Learning Outcomes:** Participatory facilitation methods are currently at the forefront of organizational development and evaluation practices. Even unintentionally, decisions about programming and evaluation are laden with taken-for-granted organizational dynamics and decision-making processes. As evaluators, we can overcome limitations in data collection and analysis (e.g. time, languages, complexity, and diversity of stakeholders) by using participatory facilitation techniques and increasing our ability as evaluators to sense, listen, and recognize both the dynamics in the room and the common threads among seemingly conflicting voices. We can model for organizations productive, meaningful, fruitful, and action-driven decision-making and evaluation processes. In this workshop, participants will experience four technologies (Pro-Action Café, Open Space, Teach-in, and Circle Practice), learn to recognize four facilitation skills (sensing, synthesizing, holding space, and pausing to discuss processes and/or group dynamics), and discuss adaptations that can be made to meet a variety of needs for evaluation and organizational development.

**Prerequisites:** None
**Level:** Beginner

Drs. Fierro and Schwartz offered this workshop at the 2013 AEA Annual Conference in Washington, D.C. as a one-day workshop. Drs. Fierro and Schwartz are independent evaluation and facilitation consultants, each with their own practice which provide participatory and collaborative evaluation, research, facilitation, and organizational development services. They have worked separately and together with varied clients and settings, including foundations, universities, community-based organizations, non-profits, and international organizations to help build organizational capacity. They provide applied participatory facilitation methodologies in their consulting practices within the United States, Italy, Africa, and virtually with participants across the world for a United Nations project. Their participants are generally professionals from both the non-profit and business sectors, Drs. Fierro and Schwartz have also co-facilitated/taught Art of Hosting Community of Practice sessions in New York City to audiences ranging from beginning-level novices to advanced practitioners.

Dr. Fierro facilitates, not only as an evaluator, but also as a trainer, college instructor, a Reiki teacher, a writer, and an activist. Dr. Schwartz facilitates discussions among many kinds of stakeholders, including funders, executive team members, program managers, and direct service providers. She also teaches graduate-level courses in program evaluation, research methods, and management.

**Workshop 22 Twelve Steps of Data Cleaning: Strategies for Dealing with Dirty Evaluation Data**

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

Evaluation data, like a lot of research data, can be messy. Rarely are evaluators given data that is ready to be analyzed. Missing data, coding mistakes, and outliers are just some of the problems that evaluators should address prior to conducting analyses for their evaluation report. Even though data cleaning is an important step to data analysis the topic has received little attention in the literature (Van den Broweck, Cunningham, Eeckels, &Herbst, 2005). The resources available in the literature tend to be complex and not always user friendly. The goal of this workshop is to go step-by-step through the data cleaning process and offer suggestions for what to do at each step.

**Learning Outcomes:**
- What our recommended 12steps are for cleaning dirty evaluation data
- Suggestions for ways to deal with messy data at each step
- Hands-on experience reviewing quantitative analysis outputs and making decisions regarding data cleaning options
Prerequisites: Basic understanding of quantitative analysis
Level: Intermediate

This workshop was conducted at AEA’s Annual Conference in 2012 and 2013. Dr. Morrow conducted this workshop as a six-hour eStudy for AEA in summer 2013. Dr. Morrow has conducted professional development workshops on data analysis and other related topics at professional conferences and universities. She has conducted a workshop entitled "Utilizing data to demonstrate effectiveness" at the 2nd annual Adolescent Sexual Health Evaluation Conference in Richmond, VA, in 2004; workshops at both the Southeastern Conference on the Teaching of Psychology and the Eastern Conference on the Teaching of Psychology in 2007 on the topic of incorporating hands-on learning in Introduction to Psychology; workshops on cleaning evaluation and assessment data at the Australasian Evaluation Society conference in 2013 and the Association for Assessment of Learning in Higher Education in 2013; and numerous trainings at both Old Dominion University and University of Tennessee on a variety of topics such as data cleaning, analyzing data using SPSS, propensity score analysis, survey research, analyzing data using Nvivo and QDA Miner, etc.

Workshop 23 Evaluation-Specific Methodology

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

Becoming skilled in the discipline of evaluation requires a clear grasp of the fundamental logic and methodology that forms its core. What is logically distinctive about evaluation is the reasoned combination of the values (e.g., needs, aspirations, ethical, and other relevant standards) with the performance data. As a profession, we have paid less attention to this than to the application and adaptation of qualitative and quantitative research methods. This is despite the fact that it is evaluation-specific methodology that far more often makes or breaks the validity and utility of evaluation. This workshop lays out the landscape of Evaluation-Specific Methodology, beginning with its logical foundations, and covering a range of methods, tools, and procedures that are specific to evaluation.

Learning Outcomes: • The logical foundations of evaluation-specific methodology
• What the main types of evaluation-specific methodology are
• How to distinguish - and explain the difference - between research methods and genuine evaluation-specific methods
• How to apply the key elements of values methodology (i.e., identifying, defining, and measuring values)
• How to apply evaluative rubrics to draw explicitly evaluative conclusions
Prerequisites: Some experience in doing, using, or commissioning evaluation.
Level: Intermediate

Michael Scriven is a leading evaluation theorist with decades of experience teaching graduate level courses and running workshops for AEA and other professional associations and organizations. Michael's workshops inspire deep and critical thinking about the fundamental issues that confront our profession.

Jane Davidson runs her own successful consulting practice, Real Evaluation Ltd, which offers evaluation workshops and professional development services. She has run successful workshops for AEA, AES, TEI, anzea, and UNISA, as well as numerous workshops tailored to specific organization’s needs. Prior to returning home to New Zealand, Jane led and taught the core evaluation courses in Western Michigan University's Interdisciplinary PhD in Evaluation.

Workshop 24 Empowerment Evaluation
Empowerment evaluation builds program capacity and fosters program improvement. It teaches people to help themselves by learning how to evaluate their own programs. Key concepts include: a critical friend, cycles of reflection and action, and a community of learners. The basic steps of empowerment evaluation include: 1) Establishing a mission or unifying purpose 2) Taking stock -- creating a baseline to measure growth and improvement 3) Planning for the future -- establishing goals and strategies to achieve objectives, as well as credible evidence to monitor change. Since the group is in charge of the evaluation itself, the role of the evaluator is that of a coach or facilitator in an empowerment evaluation. The workshop will also highlight how empowerment evaluation produces measurable outcomes. Employing lecture, activities, demonstration, and discussion, the workshop will introduce you to the steps of empowerment evaluation and technological tools to facilitate the approach.

Learning Outcomes:
• The basic steps of empowerment evaluation
• The 10 guiding principles of empowerment evaluation
• The key concepts guiding the approach (focusing on accountability)
• How to prioritizing program activities
• How to help organizations plan for the future
• How to select appropriate technological tools to facilitate an empowerment evaluation

Prerequisites: None
Level: Beginner

Dr. Fetterman has provided professional development workshops for over 35 years. They have ranged from national to local workshop training programs. Clients have included Stanford University; the Ministry of Education in Japan; Ministry of Health in Brazil; and the U.S. Office of Special Education. Dr. Fetterman has taught or facilitated empowerment evaluation workshops world-wide, ranging from Australia to Japan and Brazil to Israel. He has also successfully taught AEA Coffee Breaks and an eStudy webinar, as well as webinars for UNICEF and Claremont Graduate University.

Workshop 25 Practical Ways to Link Needs Assessment (NA) and Asset/Capacity Building

Needs assessment (NA) is assigned to evaluators assuming that they have the requisite training, but surveys (1994, 2006) indicated that few courses on it were being taught (4 and 1, respectively). In addition, recent examples of a blend of needs and the identification of asset/strengths for community and organization improvement are emerging. Thus, the morning consists of an introduction to a NA model from the 2010 needs assessment kit (SAGE Publishers) followed by an overview of concepts, definitions, principles, and getting started. In the afternoon the session turns to the steps in asset and capacity building, aspects of assets, and a hands-on activity related to same. The concluding part of the session is exposure to a hybrid framework for NA and asset/capacity building and an individual and large group scenario activity for implementing its first three steps. Throughout the day there will be hands-on work and time for questions and interaction.

Learning Outcomes: • A process model for assessing needs, concepts of needs assessment, definitions of terms, and types of needs
• Strategies for getting such an assessment started in organizations and communities
• Concepts, definitions of terms, classes of assets, and overall process for asset assessment
• Strategies for asset identification
• Hands-on work with several needs and asset identification procedure
• A hybrid model for NA and asset/capacity building that combines the somewhat opposite strategies together meaningfully
Problem areas of needs, NA, and asset/capacity building assessments.

**Prerequisites:** None

**Level:** Beginner

James W. Altschuld, Professor Emeritus at The Ohio State University, is known for work in NA. He has offered workshops on the topic at the Evaluator's Institute; meetings of the Ohio Program Evaluators’ Group; AEA; the Minnesota Evaluation Studies Institute; the government of Portugal; the Higher Education Agency of Sweden; the National Legislative Assistant's meeting; Kent State University; the California Department of Aging; and State Independent Living Council's national congress. He has been involved in research on NA (many published articles and chapters - 4 in press) and given many presentations on it for the past 30 years in international, national, and regional venues.

Mr. Altschuld has received national (the Alva and Gunnar Myrdal Practice Award of AEA for contributions to the field), state, and university awards for distinguished teaching and work in evaluation. He has been the chair of the NA-TIG for AEA and he co-wrote two books (1995, 2000) on NA, is the editor of the 2009-2010 the Needs Assessment Kit, and authored or co-authored 4 of its 5 books. He is co-editor of the 2014 issue of New Directions focused on needs assessment and his most recent book is "Bridging the Gap between Asset/Capacity Building and Needs Assessment: Concepts and Practical Applications" (SAGE, 2014).

Molly Engle is a professor and Evaluation Specialist for Oregon State University Extension Service. She is best known for her 30+ years evaluating community-based programs from start to finish. She has engaged in evaluation capacity building for the University. She has worked extensively with Dr. Altschuld in determining evaluation training programs, licensure and accreditation of evaluators and evaluation programs, and his current needs assessment efforts. She is co-editor with Dr. Altschuld on the New Directions volume on evaluation training. She has received university and national awards for her work in evaluation.

---

**Workshop 26** **Evaluative Thinking: Principles and Practices to Enhance Evaluation Capacity and Quality**

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

In her 2007 presidential address to AEA, Hallie Preskill asked, "how do we build the capacity of individuals, teams, and organizations to think evaluatively and engage in evaluation practice?" Evaluative thinking (ET) is mentioned with increasing frequency in the evaluation literature--especially in the evaluation capacity building (ECB) literature--but often only fleetingly. It remains an elusive, under-explicated construct. In an attempt to remedy this, we have worked at defining, operationalizing, and measuring the construct. In this workshop, we help participants better understand evaluative thinking in relation to their own context, and respond to Preskill's "how" question by presenting tangible activities that we believe promote ET among individuals and organizations. These active, "hands-on" learning opportunities will help participants internalize ET concepts and will also equip them with teaching tools they can use in their own ECB and evaluation contexts.

**Learning Outcomes:**
- What evaluative thinking (ET) is and how it pertains to their context.
- How to promote and strengthen ET among individuals and organizations.

**Prerequisites:** None

**Level:** Beginner

Jane Buckley and Thomas Archibald have significant facilitation experience in a number of settings. Jane earned a master's degree in education. Previously, she was an elementary school teacher and a non-formal science education coordinator. Tom has a doctorate in adult and extension education and is an assistant professor and extension specialist at Virginia Tech. He also facilitated ECB workshops and evaluation activities across Virginia and in a number of West African countries. Previously, he planned and implemented non-formal
education programs in Gabon (with the Peace Corps) and Upstate New York (with Cooperative Extension). Since 2008, both Jane and Thomas have worked together with colleagues at the Cornell Office for Research on Evaluation to create, facilitate, and evaluate ECB workshops with diverse non-formal educators from settings such as Cooperative Extension, NSF Materials Research Centers, the armed forces, university biology teachers, international education programs, international sustainable agriculture programs, and beyond.

Workshop 27 Getting Started as an Independent Evaluation Consultant: The Road to Success

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

Program evaluators who are thinking about going out on their own will find that it can be both challenging and intimidating unless they have the simple, but important skills required to be successful. This practical workshop is based on a synthesis of management consulting literature, evaluation and applied research processes, and entrepreneurial and small business skills. Through lecture, anecdotes, discussions, small-group exercises, and independent reflection, this workshop will help participants solve problems and develop strategies for action. Samples, worksheets, insider tips, trade secrets, and personal anecdotes will be provided to help address unique business issues. Participants will also be invited to share their experiences. They will leave this workshop with a clearer understanding of what it takes to be an independent consultant.

Learning Outcomes:
• Learn if consulting is an appropriate career choice
• Determine a competitive edge and find work
• Create a business plan and learn about setting up shop
• Explore some management skills---how to set fees and track time
• Think about work-life balance

Prerequisites: None
Level: Beginner

This popular workshop is back for the 28th Annual Conference with new and significantly revised materials that have been developed for Gail Vallance Barrington’s recent book, webinars, and blog discussions on consulting skills. Gail has received positive feedback from many professional researchers who have appreciated her help in determining if they have what it takes to become successful consultants. This workshop offers would-be consultants a roadmap to success.

Workshop 28 Building M&E systems for projects and programs

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

The path to strong and useful monitoring and evaluation (M&E) includes both art and science. While bad project M&E can be a painful, burdensome experience, strong and useful M&E systems directly enhance sustainable impact. Well designed and implemented M&E systems generate strong and useful information that can be used effectively for internal and external accountability and ongoing learning through the life of a project. They also generate a solid foundation of accurate, valid, reliable, time-bound, and relevant data to feed into any related evaluations. Understanding how M&E systems are best designed and effectively implemented helps evaluators as they work prospectively to design complementary evaluation, alongside program and M&E staff to implement participatory evaluation methods, or for post hoc evaluation research using M&E data from the existing system. This workshop provides participants with hands-on experience with tools and practices that strengthen M&E systems at every project stage, from proposal to close-out.
Learning Outcomes: • Attendees will learn principles and elements that ground strong and useful M&E systems
• Attendees will learn tools and strategies to develop, assess, and strengthen interrelated elements of any M&E system to make it more robust
• Attendees will learn how coherence, consistency, and consensus strengthen indicators and data components for more effective M&E systems.

Prerequisites: Participants should understand principles of social science and the basics of causal theory, logical and results frameworks, and hypothesis testing. They should be generally familiar with various modes of data collection and have some experience in evaluation.

Level: Intermediate

Catherine Elkins has delivered full day workshops at EES biennial meetings in 2010 and 2012 and half day workshops at the Canadian Evaluation Society annual meetings in 2011 and 2012. She has experience delivering curricula and facilitated training of corporate, government, and nonprofit staff and consultants, covering Quality in Program Management; Strengthening Monitoring and Evaluation;(Corporate, RTI); Fundamentals of M&E for Program Managers; and Monitoring and Evaluation of Population, Health, and Nutrition Programs.

Workshop 29 Propensity Score Matching: Theories and Applications

Oct 15, 2014 (08:00 AM - 03:00 PM)

When randomized designs are infeasible, evaluators often use quasi-experiments or observational data to estimate treatment effects. Propensity score matching, used to improve covariate balance, has been gaining popularity as a method to improve causal inferences. This workshop will include a review of quasi-experimental designs, an overview of commonly used matching methods, and an introduction for using propensity score adjustments. More specifically, we will cover basic theories and principles, a step-by-step demonstration, and software and syntax used to conduct propensity score matching. Our demonstrations will be done in both SPSS and R. We will provide attendees with a CD or flash drive containing SPSS and R code and sample data sets. Attendees are welcome to bring laptops to follow demonstrations, but are not required.

Learning Outcomes: • The theoretical basis of propensity score matching and related models; how to use propensity score matching commands in SPSS and R
• How to prepare data for analysis
• How to estimate the adjusted program effect
• How to evaluate potential bias

Prerequisites: None

Level: Beginner

Both presenters have taught similar workshops and professional development courses on propensity scores as part of the American Evaluation Association Annual Conference and through other associations. Dr. Clark has previously given several workshops and demonstrations on propensity scores to AEA conference attendees. Dr. Bai delivered a workshop on propensity score matching with R at the AEA Annual Conference in 2011, a professional development course on propensity scores at the annual meeting of the American Educational Research Association in the spring of 2012, 2013, and 2014, and two propensity score workshops at the University of Central Florida in 2012 and 2013.

Workshop 30 A Systems Thinking Expedition for Evaluators
Ex-pei-di-tion (noun): a journey or voyage undertaken by a group of people with a particular purpose. Many evaluators are beginning to use systems approaches in their practice and are realizing the benefits of such use. However, using systems approaches can still feel like traveling to a foreign country -- we might have learned a few useful phrases from this new language, but we need more practice to communicate clearly and move skillfully in systems. Through the lens of three core systems principles (inter-relationships, perspectives, and boundaries), this workshop will explore, compare, and contrast what different systems approaches can bring to evaluation practice. This highly interactive workshop, including in-depth small group work to practice specific approaches, will allow participants to learn how three systems approaches (systems dynamics, complex adaptive systems, and critical systems heuristic) can be used in modeling/mapping programs and designing systems-oriented evaluations.

Learning Outcomes: Participants will learn:
• The historical context of system sciences including developments within the evaluation field
• How to assess your current level of systems thinking skills
• How different systems approaches can be used for developing program models or articulating program theories, developing evaluation plans, and answering evaluation questions
• How to skillfully chose an appropriate systems approach based on type of program, type of evaluation, and context
• How to use systems as a process for expanding stakeholder/client understanding of programs and their outcomes

Prerequisites: We will not be spending time on introducing basic systems concepts. Participants should have experience in designing and implementing evaluation projects and some background/experience in systems theory or systems thinking.

Level: Intermediate

Jan Noga is an independent consultant based in Cincinnati. She has taught graduate level courses and workshops for non-profit, community, and government audiences on topics including research methods, human learning, systems thinking, and survey design. She has been active in AEA since 2001 and served as chair and program co-chair for the Systems in Evaluation TIG from its inception until December of 2012. Ms. Noga has taught several full-day professional development workshops for AEA over the past several years including one in 2013 with Dr. McEathron. She is also a frequent presenter at the annual meetings of AEA and the American Educational Research Association on such topics as: cluster and multi-site methods for evaluation of large-scale initiatives, evaluation of educational programs and initiatives, educational change and reform, and systems approaches for evaluating educational change and school improvement initiatives.

Mary McEathron, is the executive director of Rainbow Research Inc. in Minneapolis. Dr. McEathron has taught graduate level evaluation courses and workshops in Minnesota and numerous professional development workshops at state and national conferences, including a full-day systems professional development workshop with Ms. Noga at the 2013 AEA conference; a half-day workshop on the Critical Systems Heuristic at the 2012 Minnesota Evaluation Studies Institute (MESI); and a workshop on systems approaches at the 2014 MESI. She has been active in AEA since 2004, and served as the program co-chair of the Systems in Evaluation TIG from 2009 to 2013. Dr. McEathron has presented and chaired a number of sessions at AEA, in particular the areas of Critical Systems Heuristic, Soft Systems, multi-site evaluations, and cultural context in evaluation.

Workshop 31 Dashboarding for Evaluators

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

Data dashboards are becoming commonplace in the practice of monitoring and evaluation. If designed and built well, a dashboard can be a powerful communication tool for informing stakeholder decisions and actions that
improve program performance and impact. Unfortunately, there are many dashboards being used that get in the way of making evidence-based decisions. This workshop cuts through the hype to give you a pragmatic approach that can transform dashboards from yet another fad into an effective means for finding wisdom in information. Workshop participants will learn: 1) A dashboarding process for successfully designing, creating, and using dashboards 2) Dashboard building basics for Microsoft Excel 3) How to determine when a dashboard is an appropriate tool to use 4) What are the elements of a dashboard that facilitate effective communication

**Learning Outcomes:**
- Working definition of data dashboard and dashboard reporting
- Appropriate use of dashboards for monitoring and evaluation
- A dashboarding process that works in the field for designing, creating, and using dashboards
- Useful design guidelines for data displays
- Dashboard building basics for Microsoft Excel (and free webinar for how to build a dashboard using Excel)

**Prerequisites:**
- Basic knowledge of data (AKA information)dashboards and their use
- Basic proficiency using Microsoft Excel
- Basic quantitative data analysis knowledge and skill
- Basic experience creating graphs and charts for e

**Level:** Intermediate

Veronica Smith has over 20 years of experience facilitating professional development workshops for a variety of groups including architects, career counselors, financial and human resource professionals, job seekers and, women's professional organizations. She presented this workshop for the second time at AEA's 27th Annual Conference and received positive feedback from participants. Veronica has presented or facilitated session at three previous AEA Annual Conferences on various topics relating to dashboard practices. In addition, she has presented data visualization workshops at the 2013 Washington Education Research Conference and has been invited to present again in 2014. She has also been invited to present at the 2014 Canadian Evaluation Society conference on dashboarding for evaluators.

---

**Workshop 32 Dominators, Cynics, and Wallflowers: Practical Strategies for Moderating Meaningful Focus Groups**

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

Have you ever had a client complain or even felt yourself that data produced from focus groups cannot be trusted because one or two people dominate and contaminate the rest of the discussion? If so, this workshop is for you. In this engaging session, Robert Kahle describes ten problem types of behavior commonly encountered in focus groups. He offers field-tested, practical strategies and specific techniques for preventing, managing, and leveraging difficult behavior. A sometimes humorous and certainly insightful view of the impact of problem behavior on focus group research is presented by sharing real-life stories. Come ready to describe the problem behavior that you have encountered and share tips for handling difficult situations. This is a high energy, fun and interactive workshop with strategies and tactics you can start using immediately. Always filled to capacity, this "AEA Classic" consistently achieves among the very highest evaluation ratings from participants.

**Learning Outcomes:**
- Recognize problem early in the process
- Prevent problem behavior
- Manage problem behavior
- Leverage problem behavior
- More effectively manage group dynamics to achieve client/evaluation objectives

**Prerequisites:** Have moderated at least a couple of focus groups. Understand fundamentals of qualitative research.

**Level:** Intermediate
Robert Kahle has conducted this workshop more than 35 times, including at AEA 2009, 2010, 2011, and 2012 and via a Coffee Break and e Learning webinar. He also presented at the QRCA conferences in 2005, 2006, and 2008 and about a dozen regional QRCA meetings. Overall, Robert has trained more than 500 moderators in the techniques that he has conceptualized, tested, and refined. Evaluation feedback has always been very positive and has ranked this workshop among the very best.

**Workshop 33 Making Evaluation Data Actionable**

Wednesday, Oct 15, 2014 (08:00 AM - 03:00 PM)

Interventions and programs are implemented within complex environments that present challenges for collecting program performance information. A general problem for these initiatives and the perceptions that they often fall short of their intended objectives—is the failure to choose performance measures that are actionable, meaning that they are linked to practices that an organization or agency can actually do something about, and the changes in those practices can be linked directly to improved outcomes and sustained impact. This workshop introduces complex adaptive systems (CAS) thinking and addresses the implication for outcomes and impact. Examples used range from healthcare, education, transportation and safety, peace building and peace keeping, empowerment, and the mitigation of crime and corruption. The workshop examines evaluation measurement and focuses on data-based decision making, value-based issues, practice-based evidence, and results-focused management that can assist in supporting quality monitoring and evaluation activities from a process, outcome, and impact approach to continuous quality improvement.

**Learning Outcomes:**
- Have an understanding of complex adaptive systems and complexity theory and how it pertains to evaluation practice
- Be able to apply M&E concepts covered in workshop as appropriate to their evaluation practice
- Be able to differentiate actionable evaluation approaches from those approaches yielding static summative results
- Will be able to critique evaluation approaches in terms of how actionable the data is likely to be in supporting program improvement
- Will be able to generate and integrate actionable M&E measurement approaches into evaluation practice

**Prerequisites:** Basic knowledge of program evaluation

**Level:** Intermediate

**Anne Doucette** is the Director of The Evaluators’ Institute and has conducted evaluation training within U.S. and internationally since 2008. Most recently, she conducted training with several United Nations agencies -- specifically developed to address adult learning styles.

---

**Workshop 33 Fundamentals of Survey Sampling for Evaluators and Program Designers**

Wednesday, Oct 15, 2014 (08:00 AM - 11:00 AM)

As evaluators, we are frequently expected to analyze population characteristics and behavior to provide insight and guidance to projects. Correctly performing such tasks requires a basic understanding of the principles of sampling. This workshop targets evaluators who do not have experience in quantitative analysis, but have an interest in better understanding this fundamental technique. Beginning with clarifying the scientific language and operational lingo of the field, we will review basic approaches and identify the benefits and pitfalls of each. Using illustrations from domestic and international projects, we will explore the relationship between program implementation and sampling methodology and the role that the evaluator plays in facilitating practical data collection and analysis. Often, households are without addresses, let alone a verified census; we will examine methods to deal with this. Finally, we will discuss how the conclusions that can be appropriately drawn from data can vary as a consequence of different sampling protocols.
Learning Outcomes: • Attendees will learn about different types of sampling mechanisms and when they should be applied  
• Attendees will learn how field sampling and program implementation interact  
• Attendees will learn how to apply selected sampling techniques using practical examples  
Prerequisites: None  
Level: Beginner

Since 2011, Dr. Michael Cohen has facilitated this well-received workshop at the AEA Annual Conference at the AEA Summer Institute in 2014. He has been teaching classes and workshops for 20 years. From Columbia University, where he instructed students in computational neuroscience, to Banda Aceh, Indonesia, where he trained survey enumerators, Dr. Cohen provides practical guidance by engaging the students and using compelling examples. He has taught sampling techniques to evaluators in the U.S., Sri Lanka, Cambodia, Afghanistan, and elsewhere. In 2014, Dr. Cohen will shift the focus slightly to evaluating the "meaning" of survey data (often driven by the selected sampling methodology), as opposed to the underlying arithmetic.

Workshop 36 Acknowledging the "Self" in Developing Cultural Competency

Wednesday, Oct 15, 2014 (08:00 AM - 11:00 AM)

For the last 10 years, Dr. Özturgut has been involved in training graduate students (PhD students), teachers, administrators, and business professionals in developing cultural competency. His audience has consisted of graduate students and faculty members involved in conducting international research and business professionals conducting business in diverse cultures. Dr. Özturgut has led workshops and graduate classes in Turkey, China, and the U.S. (various cities and states) at AEA conferences, Summer Evaluation Institutes, and Coffee Break webinars and has been involved with various organizations across the U.S.

Dr. Crusto has engaged in numerous professional activities related to cultural competence. She has conducted trainings on diversity, multiculturalism, and inclusion with undergraduate students, instructors, law enforcement, and physicians. Dr. Crusto is a member of the Psychology Internship Strategic Planning Committee at the Yale School of Medicine, Department of Psychiatry. In this role, Dr. Crusto co-chairs committees addressing cultural competence in the training curriculum and facilitates diversity-related trainings and workshops with predoctoral fellows in clinical and community psychology. Drs. Özturgut and Crusto have taught this workshop at AEA conferences, through an AEA Coffee Break webinar, and facilitated the workshop at the Summer Evaluation Institutes.

Ms. Ramon has a professional background in teaching, with 12 years in special education at the elementary school level. Over the last three years, she has become more involved with developing cultural competency through her doctoral studies. Aside from academic presentations among peers and a professional conference paper presentation, most of her work in cultural competency has come from personal research. Last year, Ms. Ramon’s participated in her first professional workshop presentation on cultural competency with Dr. Özturgut and Dr. Crusto.

Workshop 37 Writing a Winning Evaluation Proposal

Wednesday, Oct 15, 2014 (08:00 AM - 11:00 AM)

This workshop is a repeat of the same workshop Hwalek and DeSole presented at AEA in 2013, updated with lessons learned from that experience. It is an expansion of the AEA Coffee Break Webinar that Melanie Hwalek provided on February 21, 2013. The workshop is based largely on an analysis of about 150 proposals that
SPEC Associates submitted over the past 11 years. The workshop takes a fresh perspective on proposal writing -- including but beyond the mechanics -- involving situational analyses of the context of proposal writing. The workshop will use the findings from the analysis to examine reasons for winning, reasons for losing, and factors to consider when deciding to write a proposal. A significant portion of the workshop will include discussion and hands-on work related to what a well-written evaluation proposal looks like.

**Learning Outcomes:**
- Different ways to think about maximizing their chances of writing a winning evaluation proposal
- What a high quality evaluation proposal contains
- Ways to understand their own track record of winning proposals

**Level:** Beginner, Intermediate, Advanced

Melanie Hwalek has extensive experience as a teacher and facilitator. She has presented sessions at AEA for more than 25 years. In addition, she facilitated workshops on program evaluation topics for CEOs and other administrative staff of nonprofit organizations and is one of the seven original national outcome measurement trainer/consultants of United Way of America, through which she provided training to several different United Way chapters and their grantees. Melanie also has prior experience as a lecturer of undergraduate students at Wayne County Community College, Wayne State University, and Oakland University.

Natalie DeSole has been facilitating evaluation meetings and sessions through SPEC Associates for more than two years. She co-facilitated this workshop at AEA's 2013 Annual Conference.

---

**Workshop 38 Fun and Games with Logframes**

Wednesday, Oct 15, 2014 (08:00 AM - 11:00 AM)

In the international development community, logic models (logframes) have become the industry standard to summarize a project/program's design and intended results. At best, they can help project design, but at worst they can straightjacket a project, imposing an external method that alienates rather than fosters local participation. Drawing upon real-world examples, this workshop uses participatory approaches to demystify logframes so local partners (or anyone) can better understand and work with them. This is important not only for local ownership of a project, but for reliable reporting as local partners often gather monitoring data. The workshop is appropriate for those who would like to better understand logframes as well as the experienced M&E practitioner/trainer interested in innovative approaches to capacity building. This workshop will show how logframes can indeed be fun!

**Learning Outcomes:**
- How a theory of change can be expressed as a results hierarchy in a logframe
- How to identify SMART indicators for a logframe, and distinguishing between different levels of indicators
- The use of the Means of Verification in a logframe, including qualitative and quantitative examples from the field
- When a risk is appropriate to list as an assumption in a logframe, why, and how they inform programming
- Overall understanding of the limitation with logframes
- Understanding of fun, participatory methods for facilitating training in logframes

**Prerequisites:** None

**Level:** Beginner

This Fun & Games with Logframes workshop was successfully delivered at the 2011 and 2008 AEA Annual Conference. It has also been successfully delivered as a professional development workshop at the European...

Specifically, this workshop has been greatly enhanced by the concurrent authoring of a M&E Training book with Brad Cousins for Sage Publications. The book includes chapters on adult pedagogy (andragogy). As quoted in the book, "The existing literature provides some information concerning a practical application component; however, there is almost no discussion of pedagogy or, more specifically, the selection of teaching strategies for a program evaluation course (Oliver et. al., 2008)." Too often there is limited attention given to instructional theory and methods in evaluation education. This is not to imply that there is an absence of pedagogical theory in the scholarship and practice of evaluation. Nonetheless, more often than not, pedagogy is implicit rather than explicit in the literature (Trevisan 2004: 207), and this workshop will help redress this shortcoming.

Outside of the evaluation association/society circuit, this workshop has been successfully delivered live in a number of settings ranging from 6 to 18 hours in length, primarily for the International Federation of Red Cross and Red Crescent Societies (IFRC), which includes a diverse audience including professional M&E practitioners, program project managers, project team staff, donors and funding agencies, and volunteers.

Workshop 39 Designing an Systemic Action Learning Infrastructure within Place-Based Evaluations

Wednesday, Oct 15, 2014 (08:00 AM - 11:00 AM)

Placed-based initiatives have evolved over the last 20 years to become one of the most promising approaches for addressing "wicked" community problems like poverty, education, health, and racial equity. In order to be responsive and meaningful, place-based evaluations must engage diverse perspectives in a process to capture and make meaning out of emerging dynamics within these complex community contexts. This workshop will provide key strategies to design and facilitate an action learning infrastructure that brings together multiple stakeholders in a flexible, self-organizing process of designing and evaluating systems change within place-based initiatives. This action learning infrastructure can be used to: identify emergent outcomes, recognize relationships between perspectives and conditions, design and pursue relevant actions across the system, and gather and use real-time data for feedback and learning. Workshop participants will actively engage in learning through small group discussion, interactive activities and simulations to practice new concepts, and large group reflection.

Learning Outcomes: • How to design an infrastructure that engages diverse stakeholders in self-organizing systemic action learning teams to actively seek information about emerging problems and identify, implement, and evaluate systems change solutions.
• How to develop an action learning agenda, facilitate the action learning process during and between meetings, track the progress of change actions at multiple system levels, and weave real-time insights and feedback across systemic action learning groups.
• How to promote an action learning environment that engages children, youth, families, professionals, and leadership in participatory data collection and analysis processes.
Prerequisites: This is an intermediate workshop. Participants should come with some knowledge of systems thinking and a systems change approach to evaluation.
Level: Intermediate

Pennie Foster-Fishman and Erin Watson have trained internationally in the design and evaluation of systems change efforts. They have provided hundreds of workshops and lectures on systems change to stakeholders within the United Nations, local, state, and federal agencies; foundations; universities; and non-profit
organizations. They have provided multiple trainings on the material within this specific workshop to evaluators, foundation staff, and non-profit organizational staff.

**Workshop 41 Developing Strong Measurement, Learning and Evaluation (MLE) Plans that Support Strategic Learning and Impact**

Wednesday, Oct 15, 2014 (12:00 PM - 03:00 PM)

"What gets measured gets done" and measuring the right contributes to achieving meaningful change. To get the most from measurement, our deep experience shows that organizations are most effective when they clearly articulate, reach agreement, and document their overall strategy and outcomes and identify concrete ways to incorporate data and evaluation into strategic learning and decision-making processes. Measurement, Learning, and Evaluation (MLE) plans document such information, processes, and tools that strengthen decision making and results. The development of these plans provides a powerful approach to driving efficient, lasting, and transformative progress toward impactful changes. In this session, ORS Impact President and CEO will share their lessons learned from developing and supporting implementation of MLE plans with a number of philanthropic partners. These will include issues to consider, relevant frameworks and techniques for developing and supporting implementation, and ongoing learning from MLE plans.

**Learning Outcomes:**
- The key components to include in MLE plans
- Relevant frameworks that can be applied in MLE plan development and how to apply them
- Techniques and approaches for supporting strategic learning products and processes

**Prerequisites:** Participants should have strong working knowledge of logic model or theory of change development and experience designing outcomes-focused evaluations.

**Level:** Intermediate

Jane Reisman, a former professor and founder of ORS Impact, has been teaching and facilitating learning in research and evaluation for over 30 years. Her interest in applied research and evaluation has been reflected in the development of several books and training guides, including Outcomes for Success, the Guide to Measuring Advocacy and Policy, and Getting Started: A Self-Directed Guide to Outcome Map Development. Jane has had the opportunity to develop and provide series of trainings in developing theory of change, evaluation plans, and strategic learning for a wide-range of organizations-ranging from the United Way of America, the United Nations, and the Annie E. Casey Foundation.

Sarah Stachowiak has experience leading professional development workshops for various non-profit and philanthropic audiences, including trainings on outcomes, theory of change development, and measurement planning. Her training groups have included a pre-session with members of Philanthropy Northwest, a Regional Association of Grantmakers; a workshop on theories of change for The Forum of Regional Associations of Grantmakers with a subset of their members focusing on advocacy and policy work; a webinar series on evaluation with Philanthropy Northwest members; participants at the Grant Managers Network conference; a workshop with program officers of the MacArthur Foundation on theories of change for advocacy and policy grantmaking; Puget Sound Grantmakers Association; members of the HUB Seattle; and Benton County United Way grantees.

**Workshop 42 An Executive Summary is not Enough: Alternative Reporting Techniques for Evaluators**

Wednesday, Oct 15, 2014 (12:00 PM - 03:00 PM)
As an evaluator, you are conscientious about conducting the best evaluation possible, but how much thought do you give to communicating your results effectively? Do you consider your job complete after submitting a final report? Reporting is an important skill for evaluators who care about seeing their results disseminated widely and recommendations actually implemented, but there are alternatives to the traditional lengthy report. This interactive workshop will present an overview of three key principles for effective reporting and engage participants in a discussion of its role in effective evaluation. Participants will leave with an expanded repertoire of innovative alternatives to the traditional report and will have the opportunity to work on a real example in groups.

Learning Outcomes:
• State the role of communicating results effectively in good evaluation practice
• State three principles for effectively communicating your results
• List three alternatives instead of, or in addition to, writing a final evaluation report
• Describe three new tips or practical resources for communicating your results

Prerequisites: None
Level: Beginner

Kylie Hutchinson has delivered this workshop at five previous American Evaluation Association conferences to very positive reviews. She has also been requested to present at the last four AEA Summer Institutes in Atlanta and African Evaluation Association conference. Despite the session's focus on alternatives to the traditional final report, the workshop being presented at the 28th Annual Conference will include more training on writing a final report.

Workshop 43 Basics of Program Design: A Theory-Driven Approach

Wednesday, Oct 15, 2014 (12:00 PM - 03:00 PM)

Evaluators often take an active role in program design, and understanding the basics of program design from a theory-driven evaluation perspective can be essential. You will learn the five elements of a basic program design and how they relate to program theory and social science research. A strong program design is an important element in evaluation design. Begin to develop your skill in putting together the pieces of a program with the potential to improve social, health, educational, organizational, and other issues. Mini lectures interspersed with small group activities will help you apply and understand the concepts presented. Examples from evaluation practice will illustrate main points and key take-home messages, and you will receive a handout of further resources.

Learning Outcomes:
• To develop a basic program design from a theory-driven evaluation perspective
• To use logic models, program theories, theories of change, and social science theory to design and improve social, health, educational, and organizational programs
• To identify roles evaluators can play in designing programs
• To describe and address the common challenges, professional, and ethical issues involved with evaluators designing or improving programs

Prerequisites: None
Level: Beginner

Stewart I. Donaldson and John Gargani co-presented this workshop in 2012 at AEA, the Hawaii-Pacific Evaluation Association Conference, and Claremont Graduate University. In all cases, it was evaluated highly by attendees. Dr. Donaldson has taught numerous graduate courses and professional development workshops on these topics. Most recently, he facilitated similar workshops at AEA conferences in 2004, 2005, 2006, 2007,
2008, 2009, and 2010. He has taught similar courses at the AEA & Centers for Disease Control Professional Development Institute, the CDC Office of Tobacco Control Professional Development Workshop, and the Claremont Graduate University Professional Development Workshop Series on Evaluation and Applied Methods.

John Gargani has taught workshops on program design, program theory, and theory-driven evaluation at Stanford University, the Curry International Tuberculosis Center, the National Symposium on Child Abuse, and CompassPoint Nonprofit Services.

---

**Workshop 44** Applications of Power Analysis in the Designs of Multilevel Experimental and Quasi Experimental Evaluations

Oct 15, 2014 (12:00 PM - 03:00 PM)

Experimental and quasi-experimental designs are widely applied to evaluate the effects of programs, policies, and practices. It is important that such studies be designed to have adequate statistical power to detect meaningful size impacts, if they occur. This workshop will introduce basic concepts in designing experimental and quasi-experimental studies and it will demonstrate how various design concepts relate to the statistical power. Workshop participants will gain practical experience using an Excel-based, open-ware tool, PowerUp! (Dong and Maynard, 2013). Work through the logic and assumptions required to determine the optimal sample size and allocation required for the study to have the desired statistical power, as well as how to estimate the minimum detectable impacts for any given level of statistical power and configuration of overall sample size units. In addition, workshop participants will learn to construct concise, well-articulated “power analysis” discussions for grant proposals.

**Learning Outcomes:**
- Factors associated with statistical power in the design of multilevel experimental and quasi-experimental (e.g., regression discontinuity design) evaluations
- How to conduct power analysis using Excel-based software, "PowerUp!" (Dong & Maynard, 2013)
- Write a good power analysis section for a grant proposal

**Prerequisites:** Basic statistics, e.g., t-test, type-I error, type-II error, statistical power, and effect sizes. Familiarity with ordinary least square regression and hierarchical linear model is a plus.

**Level:** Intermediate

**Dr. Maynard** is a University Trustee Chair Professor in the Graduate School of Education at the University of Pennsylvania. She has over 20 years of experience teaching graduate courses in program evaluation and policy analysis and research synthesis methods. She also has conducted numerous hands-on training sessions on power analysis, monitoring and evaluation, and experimental evaluation designs for doctoral students, government research staff, and international research organizations.

**Dr. Dong** is an assistant professor at the College of Education, University of Missouri. He teaches graduate level courses in quantitative methods.

Dr. Maynard and Dr. Dong delivered similar workshop at the University of Pennsylvania, New York University, the University of Michigan’s IES pre-doctoral training programs; the Institute of Education Sciences, and the American Institute for Research (AIR).

---

**Workshop 45** Whose Judgment Matters Most: Using Child-to-Child approaches to evaluate vulnerability-centered programs
Wednesday, Oct 15, 2014 (12:00 PM - 03:00 PM)

The perspective of youth in evaluation is often absent. This results in evaluative claims based on insufficient evidence, questioning the basis upon which program worth is judged. How can evaluation engage youth as active change agents to identify needs, develop solutions and evaluate changes in attitudes and behaviors for improved community well-being?

Participatory evaluation approaches have been used for years to give voice to the poor and other vulnerable persons. However, information collected is often based on indicators developed by outsiders and focused on perspectives of adults as 'key informants.' This can overlook significant data sources including children and adolescents.

This workshop will demonstrate the benefits of engaging youth in evaluation through Child-to-Child approaches. These approaches center evaluation criteria around the values and perspectives of young people, creating environments for continual learning among peers and families. Children learn new academic skills and evaluative thinking while having fun solving community problems!

Learning Outcomes:
• How to apply and adapt 2-3 practical methods for investigating, planning, monitoring, and evaluating programs by centering the values and perspective of people affected most by poverty and inequality. These are people who traditionally get neglected in decision making processes due to age, unequal power relations, limited resources, low literacy and numeracy skills, disabilities, gender inequality, stigma and discrimination, displacement as a result of conflict and disasters, among other circumstances that make people vulnerable
• Key steps to engage under-represented voices in determining and establishing values and criteria upon which the program's success is to be judged
• How to construct a team process that maximizes meaningful participation, quality data collection, and collective analysis and interpretation of results
• How to determine the most appropriate participatory tools to engage under-represented voices in developing a rubric for evaluating outcomes, leading to findings that are valid, credible, relevant, useful, and community-owned
• Guiding principles, tips and traps, and helpful hints for applying these methods in their own work.

Prerequisites: Experience or interest in working in developing countries will be helpful.

Level: Beginner

Tererai Trent, PhD, MPH has facilitated participatory monitoring and evaluation techniques for more than 18 years. She taught a participatory methods course for the AEA conference in 2012 (one-day) and 2013 (two-day). She has subsequently taught an eStudy on the subject with two other AEA members. From Zimbabwe, she brings together viewpoints from both the developed and developing world. As Heifer International's PM&E Director (2002-2010) she trained field staff in more than 15 countries. Dr. Trent developed the 'Participatory Program Planning and Evaluation Logic Model' for Heifer International and helped build the capacity of program staff and partners to apply these methods to engage marginalized and vulnerable persons in efforts to overcome poverty and inequality in all five continents of the world. In addition to her work with Heifer International, Dr. Trent served as an independent Gender, Agriculture and PRA Consultant for a refugee resettlement camp in Zimbabwe under United Nations High Commissioner for Refugees (UNHCR) funding. She also served as a technical consultant for FAO GCP/RAF/2297/ITA, a Southern Africa Action Program for Communication Development. In this role, she provided technical training in communication action-research for Namibia, Zambia, Mozambique and Zimbabwe. She is currently working on developing gender mainstreaming indicators for a country wide M&E plan as the Senior Gender Mainstreaming Expert for USAID-Zimbabwe's Strategic Economic Research and Analysis (SERA) Project.

Abdul Thoronka, MSc, has over 10 years of experience as a community health professional in Sierra Leone, Liberia, and Mozambique. He has extensively incorporated principles of participatory learning and action through the 'Community Health Club' Model and 'Child-to-Child' approaches. Using the 'Train the Trainers' approach, he has built the capacity of staff, partners, and community members to apply these methods to engage marginalized and vulnerable persons in efforts to overcome poverty and inequality in humanitarian relief, transitional and longer-term development contexts. Abdul received his Master of Science degree in
International Primary Health Care from the University of London with a focus on Quality Assurance and Service Development for people with disabilities. He currently works as a community support manager for a non-profit organization in Madison, Wisconsin.

**Workshop 47 Beyond the Basics of Program Design: A Theory-Driven Approach**

Saturday, Oct 18, 2014 (02:00 PM - 05:00 PM)

Building on the popular workshop Basics of Program Design, this hands-on class will help you take your program design skills to the next level. A strong program design is critical to the success of social, health, educational, organizational, and other programs. Consequently, evaluators with strong design skills can improve a program's chances of success—and the quality of their evaluations—by taking an active part in the design process. You will learn how to accomplish this with stakeholders in collaborative settings, and how it can yield stronger, more useful evaluations. Mini lectures interspersed with small group activities will help you apply and understand the concepts presented. Examples from evaluation practice will be provided to illustrate main points and key take-home messages and you will receive a handout of further resources.

**Learning Outcomes:**
- To develop, refine, and integrate all the elements of a program design from a theory-driven evaluation perspective
- To ensure that stakeholder values are embedded in the program
- To connect program activities with program purposes in a detailed, comprehensive way
- To use a program design to craft comprehensive monitoring and evaluation systems
- To identify roles evaluators can play in a collaborative design process
- To describe and address the common challenges, professional, and ethical issues involved with evaluators designing or improving programs

**Prerequisites:** We build on the "Basics of Program Design" workshop. It is recommended that participants attend this workshop first, but it is not required.

**Level:** Intermediate

Stewart I. Donaldson and John Gargani have co-presented "Basics of Program Design" workshop, which is the prerequisite for this workshop, in 2012 at the AEA Hawaii-Pacific Evaluation Association Conference and Claremont Graduate University. In all cases, it was evaluated highly by attendees.

Stewart I. Donaldson has taught numerous graduate courses and professional development workshops on these topics. Most recently, he facilitated similar workshops at AEA in 2004, 2005, 2006, 2007, 2008, 2009, and 2010. He has taught similar courses at the AEA & Centers for Disease Control Professional Development Institute, the CDC Office of Tobacco Control Professional Development Workshop and the Claremont Graduate University Professional Development Workshop Series on Evaluation and Applied Methods.

John Gargani has taught workshops on program design, program theory, and theory-driven evaluation at Stanford University, the Curry International Tuberculosis Center, the National Symposium on Child Abuse, and CompassPoint Nonprofit Services.

**Workshop 48 Mixed Methods in International Development: Just a fad or a reasonable strategy to enhance the quality of Performance and Impact Evaluation?**

Saturday, Oct 18, 2014 (02:00 PM - 05:00 PM)

Use of mixed methods in international development evaluation remains a hot topic that merits in-depth exploration. Based on the evidence-based adult learning methodologies, as well as the extensive use of participatory approaches, this workshop will allow you to enhance your theoretical understanding and
operational application of mixed methods in international development evaluation. In an effort to foster active learner participation, solution-centered, collaborative learning and self-efficacy, the workshop is designed to enhance your knowledge about and use of mixed methods in response to specific evaluation questions. You will learn about different mixed methods designs and apply this knowledge to scenarios from international development projects.

**Learning Outcomes:**
- Understand the key assumptions and purposes associated with the use of quantitative and qualitative methods in international development evaluations
- Identify the limitations characterizing the separate use of quantitative and qualitative evaluation methods and understand the added value of combining of methods to address evaluation questions more effectively
- Understand the logistical and cultural criteria that ought to be consider before mixing methods
- Use mixed method not only during the data collection phase but also during the hypothesis development, analysis and interpretation phases
- Identify the different types of methods combinations
- Identify good practices in mixing methods and adopt strategies to address any possible operational challenges associated with the use of MM in international development evaluation

Locate useful MM-related resources (e.g. websites, journals, statistical software packages, etc.) for the further development of their MM work

**Prerequisites:** At least one year's experience in evaluation in international development

**Level:** Intermediate

**Donna Mertens** taught a similar workshop in 2013 for AEA and in several international contexts, including Australia, New Zealand, India, England, Italy, Nepal, Sri Lanka, and Egypt. Dr. Mertens is a Professor in the Department of Education at Gallaudet University in Washington, D.C., and teaches evaluation methods and program evaluation to deaf and hearing students at the graduate levels. In 2007, she was honored with the Most Distinguished Faculty Award at Gallaudet, based on nominations from former and current students. The majority of her students are professionals with full time positions; consequently she has adapted her teaching style to encourage application of ideas within the student's work venue. In addition, she has taught portions of this workshop in various settings, including the United Nations' UNIFEM workshops in South Africa, the AEA/Duquesne Graduate Education Diversity Internship Program, the Minnesota Evaluation Studies Institute, the National Center on Low Incidence Disabilities, and Wisconsin's NSF Research Evaluation and Technical Assistance (RETA) Adding Value Conference. She also taught a similar workshop at Cambridge University's International Conference on Mixed Methods.

**Dr. Tarsilla** has designed and implemented mixed methods evaluation in over 25 countries in sub-Saharan Africa and Latin America for the UN, the World Bank, and a variety of other agencies and governments. Building on his gender-responsive and participatory evaluation work as well his methodological versatility, he has demonstrated a superior understanding of adult learning methodologies applied to evaluation across a variety of sectors and cultural contexts as well as among very diverse audiences (from in-country government officials to NGOs as well as community-based organizations). Over the last three years, Dr. Tarsilla has designed and delivered nearly 20 evaluation workshops (one week and two weeks in duration) aimed at program managers and evaluation specialists at USAID, the State Department and Millennium Challenge Corporation (both at HQ and overseas missions). Through his facilitation endeavors and transformative research work, Dr. Tarsilla has been especially focused on enhancing his clients' capacity to track and measure their performance effectively as well as to foster their utilization of evaluation findings and their formulation of evidence-informed and right-based policies. In doing so, Dr. Tarsilla has always made sure to combine his expertise with clarity, compassion, cultural responsiveness, enthusiasm, ethical responsibility and humor. A Fulbright Scholar at the Georgetown University School of Foreign Service and a Doctor in Interdisciplinary Evaluation from Western Michigan University, Michele has been receiving and delivering formal evaluation training in an academic setting for over 10 years. More recently, he has successfully taught M&E workshops at Georgetown University and University of Colorado-Boulder.
**Workshop 49** Case Study Methods in Evaluation

Saturday, Oct 18, 2014 (02:00 PM - 05:00 PM)

Case Study Methods allow evaluators to approach program assessment from a powerful and flexible design palette. While often heavily steeped in the use of qualitative methods, case studies may also include the use of quantitative data. The approach is particularly rich for tinting and shading the effects of programs as well as investigating important program questions in depth.

**Learning Outcomes:**
- Comprehend the role of case study methods within the context of other evaluation approaches
- Be able to describe the elements of case study research and identify the major strengths and weaknesses of the approach
- Understand the sequential, operational guidelines for implementing case study research
- Review techniques for establishing the validity and reliability of case study data and findings

**Prerequisites:** Participants should be familiar with the general conduct of program evaluation and the different approaches possible.

**Level:** Intermediate

Rita O'Sullivan has been a General Evaluation Trainer since 1986 and an AEA/CDC trainer since 2005. Throughout her career, Rita O'Sullivan has completed multiple graduate classes and workshops focused on multiple case study methods. Her most recent case study training took place at the Evaluation 2013 in Washington, D.C.

---

**Workshop 50** Collaborative Evaluations Step-by-Step

Saturday, Oct 18, 2014 (02:00 PM - 05:00 PM)

**Session Abstract:**
This highly interactive workshop is for evaluators who want to engage and succeed in collaborative evaluations. In clear and simple language, the facilitators outline key concepts and effective methods to help master the mechanics of collaboration in the evaluation environment. Building on theoretical grounding, you will explore how to apply the Model for Collaborative Evaluations (MCE) to real-life experiences, with a special emphasis on elements that facilitate stakeholders' involvement. Using highly interactive discussion, demonstrations, and hands-on group exercises, this workshop addresses specific steps and tools to effectively conduct collaborative evaluations. The facilitators share their experiences and insights regarding this topic in a precise, easy to understand fashion, so that you can use the information learned from this workshop immediately. You are encouraged to bring actual evaluation examples, present scenarios and/or specific problem areas for discussion and improvement.

**Learning Outcomes:**
- Fundamental premises and components of collaborative evaluations
- Pros and cons of collaborative evaluations
- A framework for planning, executing, and reporting sound collaborative evaluations
- Step-by-step resources to guide collaborative evaluations

**Prerequisites:** None

**Level:** Beginner

Liliana Rodriguez-Campos and Rigoberto Rincones Gomez bring over 35 years of combined experience in facilitating workshops across a variety of settings and countries. Liliana and Rigoberto have developed and offered training in English and Spanish to a variety of national and international audiences. Both facilitators have received excellent reviews from their workshop attendees. In addition, Liliana teaches a doctoral level
Workshop 51 Leading Through Evaluation

Saturday, Oct 18, 2014 (02:00 PM - 05:00 PM)

The evaluation community recognizes the important use of evaluation for learning, accountability, and program design; evaluators discuss the political nature of evaluation, even though there is a common focus on technical and methodological issues. Evaluation is increasingly becoming a key strategy for change management at all levels. In leadership guru Ron Heifetz's words, evaluators are cast in the position of "helping groups get their work done" by facilitating dialogue and strategic thinking based on ‘evidence.’” According to Heifetz, people can lead from any position in an organization through acts of leadership. This workshop will help participants explore the power of their own personal response to the call for leading change through evaluation. All evaluators would benefit from greater self-awareness and self-management as they lead change through evaluation.

Learning Outcomes: • Deepen understanding of personal style through self-assessment (Strenthsfinder or other) • Identify sources of personal mental models of leadership • Use systems thinking to reframe personal logic model of evaluation

Level: Beginner

Tessie Tzavaras Catsambas is President of EnCompass LLC and has extensive experiential facilitation experience. She has 25 years of experience in planning, evaluating, and managing international programs and activities. Ms. Catsambas is an innovator and practitioner in appreciative evaluation methods. She has co-authored of the book Reframing Evaluation Through Appreciative Inquiry, has facilitated eight workshops at the AEA Annual Conference since 2002, including on a workshop focused on Appreciative Inquiry and Gender Responsive Evaluation, workshops to the South Asia Community of Evaluators on Collaborative Learning, and to AfrEA on Advocating for Evaluation.

Workshop 52 Equity-Focused and Gender Responsive Evaluation: How to design, manage and use evaluations from an equity and gender equality perspective

Saturday, Oct 18, 2014 (02:00 PM - 05:00 PM)

The push for a stronger focus on equity and gender equality in human development is gathering momentum at the national and the international level. The premise of achieving equitable development results as well as mainstreaming gender and human rights issues in all development work is central to United Nation agencies' mandates and increasingly leading national policies and international alliances to adopt equity and gender equality as a focus. This shift poses both opportunities and challenges to the evaluation function. How can one strengthen the capacity of Governments, partner organizations, and communities to evaluate the effect of interventions on gender and equitable outcomes for marginalized populations? What are the evaluation questions for assessing an intervention's impact on gender equality and equity? This workshop aims to equip participants to address the methodological implications in designing, conducting, managing, and using equity and gender responsive evaluations.
Learning Outcomes: How to define and measure equity and gender in the development context
• How to plan, design, and conduct evaluations of policies, programs, and projects whose outcomes aim to improve the well-being of marginalized and disadvantaged populations
• How to use equity-focused and gender sensitive evaluations as an opportunity for equitable development work
Prerequisites: None
Level: Intermediate

Inoussa Kabore, Florencia Tateossian, and Ibrahima Thierno Lo have facilitated this workshop at several conferences including, but not limited to, the recent AfrEA conference, American Evaluation Association conferences, and a few modules at CLEAR/CESAG regional trainings. The co-authors are well seasoned facilitators with each more than 10 years experiences in workshop facilitation in various settings and various audiences.