Delivering capacity building that evaluators need to succeed.
to assess whether existing measures are suitable for your evaluation project will be examined. Issues associated with the development and use of these measures will be explored in terms of how to establish sound psychometric properties, and what cautionary statements should accompany interpretation and evaluation findings using these new measures.

Criteria for choosing measures: Assessing the adequacy of measures in terms of the characteristics of measurement—choosing measures that fit your evaluation theory and evaluation focus (exploration, needs assessment, level of implementation, process, impact and outcome). Measurement feasibility, practicability, and relevance will be examined. Various measurement techniques will be examined in terms of precision and adequacy, as well as the implications of using screening, broad-range, and peaked tests.

Error/influences on measurement precision: The characteristics of various measurement techniques, assessment conditions (setting, respondent interest, etc.), and evaluator characteristics will be addressed.

Participants will be provided with a copy of the text. Scale Development: Theory and Applications by Robert F. DeVellis (Sage 2016).

Basics of Program Evaluation

Instructor: Arnold Love, PhD, internationally recognized independent consultant based in Toronto, Canada.

Description: With an emphasis on constructing a sound foundational knowledge base, this course is designed to provide an overview of both past and contemporary perspectives in evaluation theory, method, and practice. Course topics include, but are not limited to, basic evaluation concepts and definitions; evaluation as a cognitive activity; the view of evaluation as a transdisciplinary; the general and specific thinking logic of evaluation; an overview of the history of the field; distinctions between evaluation and basic and applied social science research; evaluation-specific methods (e.g., needs assessment, stakeholder analysis, identify evaluative criteria, standardized setting reasons and motives for conducting evaluations; central types and purposes of evaluation; objectivity, bias, and validity; the function of program theory in evaluation; evaluator roles; core competencies required for conducting high quality, professional evaluation; audiences and users of evaluation; alternative evaluation models and approaches; the political nature of evaluation and its implications for practice; professional standards and codes of conduct; and emerging and enduring issues in evaluation theory and practice. Although the major focus of the course is program evaluation in multiple settings (e.g., education, criminal justice, health and medicine, human and social services, international development, science and technology), examination from personnel evaluation, policy analysis, and product evaluation also will be used to illustrate foundational concepts. The course will conclude with tough judgment calls, and conduct high-quality evaluations using a contingency-based and situational approach, including evaluation purposes, resources (e.g., time, budget, expertise), uses and users, competing demands, and other relevant contingencies. Throughout the course, active learning is emphasized and, therefore, the instructional format consists of instructor-led presentations, discussions, and application exercises. Audiences for this course include those who have familiarity with social science research but are unfamiliar with evaluation, and evaluators who wish to review current theories, methods, and practices.

Prerequisites: Basic knowledge of social science research methods.

Ethics in Practice: A Global Perspective
Instructor: Michael Quinn Patton, PhD, Founder and Director, Utilization–Focused Evaluation; independent evaluation consultant.

Description: The course will compare and contrast various ethical guidance statements for evaluators from around the world, including the OECD/DAC Quality Standards for Development Evaluation, the Joint Committee Standards, and ethical guidance adopted by national evaluation associations. The course will examine overarching ethical frameworks for evaluation: Universal Declaration of Human Rights; Sustainability; the Paris Declaration Principles on Development Aid; and principles for conducting research with indigenous people. Professional evaluation associations and networks around the world have adopted ethical guidelines, standards, and principles. These recognize that evaluators can and do face a daunting array of ethical challenges. The political, cultural, and contextual variations that evaluators face mean that ethical judgment must be exercised about what is appropriate in a particular situation. Few rules can be applied. Rather, ethical guidance consists of principles that must be interpreted. Tough judgment calls must be made about what to do. This course is about those interpretation and judgment processes. Ethical judgments apply at every stage of evaluation, in initial interactions with stakeholders, in design decisions, throughout data collection, and in analyzing, reporting, and facilitating use of findings. Much of the course will be examining specific ethical challenges commonly reported among evaluators working internationally. Participants will also have an opportunity to share and discuss their own experiences in dealing with ethical challenges.

The course is based on the TEI premise that ethical practice is one of the emergent methods and models for evaluation; competent evaluators are ethical evaluators. The outcomes of the course are: participants will know the ethical standards of evaluation as an international profession; have increased confidence that they can wisely, astutely, and effectively perform ethical standards in their own practice; and have a deeper sense of professionalism as a result of being more deeply grounded in the ethical foundations of evaluation.

Evaluation Research Methods: A Survey of Quantitative and Qualitative Approaches
Instructor: David B. Wilson, PhD, Professor in the Department of Criminology, Law & Society at George Mason University.

Description: This course will introduce a range of basic quantitative and qualitative social science research methods that are applicable to the evaluation of various programs. This is a foundational course that introduces methodologies developed more fully in other TEI courses and serves as a critical course designed to ensure a basic familiarity with a range of social science research methods and concepts.

Topics will include observational and qualitative methods, survey and interview (structured and unstructured) techniques, experimental and quasi-experimental designs, and sampling methods. This course is for those who want to update their existing knowledge and skills and will serve as an introduction for those new to the topic.

Text provided: Creswell, J. Research Design (Sage, 2014).

Informing Practice Using Evaluation Models and Theories
Instructor: Melvin M. Mark, PhD, Professor of Psychology at Pennsylvania State University.

Description: Evaluators who are not aware of the contemporary and historical aspects of the profession “are doomed to repeat past mistakes and, equally debilitating, will fail to sustain and build on past successes.” Madus, Scriven, and Stufflebeam (1983). “Evaluation theories are like military strategy and tactics; methods are like military weapons and logistics.” The commander needs to know strategy and tactics to deploy weapons properly or to organize logistics in different situations. Good evaluator theories need theories for the same reasons: choosing and deploying methods.” Shadish, Cook, and Leviton (1991).

These quotes from Madus et al. and Shadish et al. provide the perfect rationale for why the serious evaluator should be concerned with models and theories of evaluation. The primary purpose of this class is to overview major streams of evaluation theories (or models) and to consider their implications for practice. Topics include: (1) why evaluation theories matter; (2) frameworks for classifying different
Theories, (3) in-depth examination of 4-6 major theories, (4) identifying tools and skills that can help you in any one theory, and (6) tools and skills that can help you in picking and choosing from different theoretical perspectives in planning an evaluation in a specific context. The overarching theme will be on practice implications—that is, on what difference it would make for practice to follow one theory or some other.

The course is based on the TEI premise that ethical practice can increase their chances of “doing the (ethically) right thing” when conducting evaluations in the field. Participants should also be better prepared to interact with stakeholders in a fashion that lessens the likelihood that the latter will engage in behaviors that lead to ethical difficulties.

### Working With Evaluation Stakeholders

**Instructor:** John Bryson, PhD, McKnight Presidential Professor of Planning & Public Affairs, Hubert H. Humphrey Institute of Public Affairs, University of Minnesota, Minneapolis

**Description:** Working with stakeholders is a fact of life for evaluators. That interaction can be productive and beneficial to evaluation studies that inform decisions and produce positive outcomes for decision makers and program recipients. Or that interaction can be draining and conflictual for both the evaluator and the stakeholders and lead to studies that are misguided, cost too much, take too long, never get used, or never get done at all. So this is an incredibly important topic for evaluators to explore. This course focuses on strategies and techniques to identify stakeholders who can, and will, be most beneficial for the achievement of study goals and how to achieve a productive working relationship with them. Stakeholder characteristics like knowledge of the program, power and ability to influence, willingness to participate, etc., will be analyzed, and strategies and techniques are presented to successfully engage stakeholders for effective collaboration.

### M&E: Frameworks and Fundamentals

**Instructor:** Ann M. Doucette, PhD, SIEPi Special Projects Director, Research Professor, Claremont Graduate University

**Description:** The overall goal of Monitoring and Evaluation (M&E) is the assessment of program progress to optimize outcomes for decision makers and program recipients. Strategies for preventing ethical problems, and the like. The increased emphasis on effectively managing toward favorable results demands a more comprehensive M&E evaluation approach in order to identify whether strengths and weaknesses, the value, merit and worth of the program impact pathways, the effectiveness, the adequacy of program impact pathways, or national, state, provincial, and county governments. Familiarity with evaluation is helpful, but not required.

### Professional Standards and Principles for Ethical Evaluation Practice

**Instructor:** Michael Flotris, PhD, Professor of Psychology at the University of New Haven

**Description:** Participants will explore the ethical issues that can arise at various stages of the evaluation process, from entry to the program effectiveness, the adequacy of program impact pathways, the strength and weaknesses of the value, merit and worth of the initiative, and the like. The increased emphasis on effectively managing toward favorable results demands a more comprehensive M&E evaluation approach in order to identify whether strengths and weaknesses, the value, merit and worth of the program impact pathways, the effectiveness, the adequacy of program impact pathways, or national, state, provincial, and county governments. Familiarity with evaluation is helpful, but not required.

### Evaluation Theory, Design, and Methods

**Instructor:** Delwyn Goodrich, PhD, Evaluation practitioner/psychologist, Melbourne, Australia

**Description:** Case study approaches are widely used in program evaluation. They facilitate an understanding of the way in which context mediates the influence of program and project interventions. While case study designs are often adopted to describe or depict program processes, their capacity to illuminate depth and detail can also contribute to an understanding of the mechanisms responsible for program outcomes. The literature on case studies is impressive, but there remains tension in perspectives about what constitutes good case study practice in evaluation. This leads to substantive differences in the case studies are conceived and practiced within the evaluation profession. This workshop aims to disentangle the discussions and debate, and highlight the central principles and techniques that are most beneficial for the achievement of study goals and how to achieve a productive working relationship with them. Stakeholder characteristics like knowledge of the program, power and ability to influence, willingness to participate, etc., will be analyzed, and strategies and techniques are presented to successfully engage stakeholders for effective collaboration.

This two-day workshop will explore case study design, analysis, and representation. The workshop will address case study topics through brief lecture presentation, small group discussion, and workgroup presentation and feedback scenarios. Participants will be encouraged to examine the conceptual underpinnings, defining features, and practices involved in doing case studies in evaluation contexts.

### Conducting Successful Evaluation Surveys

**Instructor:** Jolene D. Smyth, PhD, Associate Professor in the Department of Sociology at the University of Nebraska—Lincoln, Director of the Bureau of Sociological Research

**Description:** The success of many evaluation projects depends on the quality of survey data collected. In the last decade, sample members have become increasingly reluctant to respond, especially in evaluation contexts. In response to these challenges and to technological innovation, methods for doing surveys are changing rapidly. This course will provide new and cutting-edge information about best practices for designing and conducting surveys, and will focus on how to identify and fix common occurring survey issues. The course will cover writing questions; visual design of questions (drawing on concepts from the vision sciences) putting individual questions together into a formatted questionnaire; designing web surveys; designing for multiple modes; and fielding surveys and encouraging response by mail, web, or in a mixed-mode design.

### Qualitative Data Analysis: Practical Strategies

**Instructor:** P. Bazeley, Professor of Psychology at the University of Nebraska—Lincoln, Director of the Bureau of Sociological Research

Sampling: Basic Methods for Probability and Non-Probability Samples

Instructor: Gary T. Henry, PhD, Distinguished Professor of Education Policy, Leadership, Policy, & Organization, Peabody College, Vanderbilt University

Description: Careful use of sampling methods can save resources and often increase the validity of evaluation findings. This seminar will focus on the following: (a) The Basics: defining sample, sampling and validity, probability and non-probability samples, and when to not to sample; (b) Error and Sampling: study logic and sources of error, target population and sampling frame; (c) Probability Sampling: Methods: simple random sampling, systematic sampling, stratified sampling, cluster sampling, and multi-stage sampling; (d) Making Choices: before, during, and after sampling; and (e) Sampling Issues: Many examples will be used to illustrate these topics and participants will have the opportunity to work with case exercises. The instructor’s text Practical Sampling (Sage 1990) will be provided as part of the course fee in addition to take-home class work materials.

Using Non-Experimental Designs for Impact Evaluation

Instructor: Gary T. Henry, PhD, Distinguished Professor of Education Policy, Leadership, Policy & Organization, Peabody College, Vanderbilt University

Description: In the past few years, there have been very exciting developments in approaches to causal inference that have expanded our knowledge and toolkit for conducting impact evaluations. Evaluators, statisticians, and social scientists have focused a great deal of attention on causal inference, the benefits and drawbacks of random assignment strategies and alternative designs for estimating program effects. For this workshop, we will have three goals:

- To understand a general theory of causal inference that covers both random assignment and observational studies, including quasi-experimental and non-experimental studies
- To identify the assumptions needed to infer causality in evaluations
- To describe, compare, and contrast six promising alternatives to random assignment studies for inferring causality, including the requirements for implementing these designs, the strengths and weaknesses of each, and examples from evaluations where these designs have been applied.

Note: Prior to attendance, those with no previous experience with program theory should work through the University of Wisconsin Extension’s course in Enhancing Program Performance With Logic Models, available at no cost at uwex.edu/ces/impcourse/

Prerequisites: This class assumes some familiarity with research design, threats to validity, impact evaluations, and multivariate regression.

Using Program Theory and Logic Models in Evaluation

Instructor: Patricia Rogers, PhD, Professor in Public Sector Evaluation at RMIT University (Royal Melbourne Institute of Technology), Australia

Description: It is now commonplace to use program theory, or logic models, in evaluation as a means to explain how a program is understood to contribute to its intended or observed outcomes. However, this does not mean that they are always used appropriately or to the best effect. At their best, logic models can provide conceptual clarity, motivate staff and focus evaluations. At their worst, they can divert time and attention from other critical evaluation activities, provide an invalid or misleading picture of the program, and discourage critical investigation of causal pathways and unintended outcomes. This course focuses on developing useful logic models and using them effectively to guide evaluation and avoid some of the most common traps. It begins with the assumption that participants already know something about logic models and program theory but come with different understandings of terminology and options. Application exercises are used throughout the course for demonstration of concepts and techniques: (a) as ways to use logic models to positive advantage (e.g., to identify criteria, develop questions, identify data sources and bases of comparison); (b) ways they are used with negative results (e.g., focusing only on intended outcomes, ignoring differential effects for client subgroups, seeking only evidence that confirms the theory); and (c) strategies to avoid traps (e.g., differentiated theory, market segmentation, competitive elaboration of alternative hypotheses). Participants receive the instructor’s co-authored text, Programmed Purpose Theory (Jossey-Bass 2011).

Prerequisites: This class requires attendance by participants who have completed the University of Wisconsin Extension’s course in Enhancing Program Performance With Logic Models, available at no cost at uwex.edu/ces/impcourse/
Comparative Effectiveness: Exploring Alternatives to Randomized Clinical Trials

Instructor: Ann M. Doucette, PhD, TEI Special Projects Director, Research Proposal Project, Claremont Graduate University

Description: Evidence is the foundation on which we make judgments, decisions, and policy. Gathering evidence can be a challenging and time-intensive process. Although there are many approaches to gather evidence, randomized clinical trials (RCTs) have remained the “gold standard” in establishing effectiveness, impact, and causality, despite the fact that strong proponents of RCTs sometimes assert that RCTs are not the only valid method, nor necessarily the optimal approach in gathering evidence. RCTs can be costly in terms of time and resources; can raise ethical concerns regarding the exclusion of individuals from treatments or interventions from which they might benefit; and can be inappropriate if the intervention is not sufficiently and stably implemented or if the program/service is so complex that such a design would be challenging at best and likely not to yield ecologically valid results. Comparative effectiveness (CE) has emerged as an accepted approach in gathering evidence for health care decision and policymaking. CE emerged as a consequence of the worldwide emphasis how rigorous evaluation of the data yielded the unique niche of developmental evaluation and what might benefit; and can be inappropriate if the intervention is not sufficiently and stably implemented or if the program/service is so complex that such a design would be challenging at best and likely not to yield ecologically valid results. Comparative effectiveness (CE) has emerged as an accepted approach in gathering evidence for health care decision and policymaking. CE emerged as a consequence of the worldwide emphasis on whether and how CE (definition, methods, analytical models, dissemination strategies, etc.) can be applied to other health care quality—and a more immediate need for evidence of effective health care. RCTs, while yielding strong evidence, were time intensive and posed significant delays in providing decision-makers with timely policy and care decisions. CE provided a new approach to gather objective evidence and emphasized how rigorous evaluation of the data yielded across existing studies (qualitative and quantitative) could answer questions regarding the works for whom and under what conditions. Essentially, CE is a rigorous evaluation of the impact of various intervention options, based on existing studies that are available for specific populations. The CE evaluation of existing studies focuses not only on the benefits and risks of various interventions, but also incorporates the costs associated with them. CE takes advantage of both qualitative and quantitative approaches, using a standardized protocol in judging the strength, and synthesis of the evidence provided by existing studies. The basic CE questions are: Is the available evidence good enough to support high-stakes decisions? If we rely solely on RCTs for evidence, will it result in a risk that non-RCT evidence will not be considered sufficient as a basis for policy decisions? Will sufficient evidence be available for decision-makers at the time when they need it? What alternative approaches can be used to ensure that rigorous findings be made available to decision-makers when they need to act? CE has become an accepted alternative to RCTs in medicine and health. While CE approach has potential for human and social interventions that are implemented in other areas (e.g., education policies, urban and community development, etc.). This course will provide an overview of CE from an international perspective (U.S., UK, Canada, France, Germany, Turkey), illustrating how different countries have defined and established CE frameworks; how data are gathered, analyzed, and used in health care decision-making; and how information is disseminated and whether it leads to change in health care delivery. Though CE has been targeted toward enhancing the impact of health care intervention, this course will consistently focus on whether and how CE (definition, methods, analytical models, dissemination strategies, etc.) can be applied to other health and social program areas (education, justice, poverty, environment, etc.).

No prerequisites are required for this one-day course.

Developmental Evaluation: Systems and Complexity

Formerly taught as Alternative Evaluation Designs: Implications From Systems Thinking and Complexity Theory

Instructor: Michael Quinn Patton, PhD, Director, Utilization-Focused Evaluation and independent evaluation consultant

Description: The field of evaluation already has a rich variety of contrasting models, competing purposes, alternative methods, and divergent techniques that can be applied to projects and organizational innovations that vary in scale, comprehension, and complexity. The challenge, then, is to match evaluation to the nature of the initiative being evaluated. This means that we need to have options beyond the traditional approaches (e.g., linear logic models, experimental designs, and pre-post tests) when faced with systems change dynamics and initiatives that display the characteristics of emergent complexities. Important complexity concepts with implications for evaluation include uncertainty, nonlinearity, emergence, adaptation, dynamical interactions, and co-evolution.

Developmental evaluation supports innovation development to guide adaptation to emergent and dynamic realities in complex environments. Innovations can take the form of new programs, projects, products, organizational changes, policy reforms, and system interventions. A complex system is characterized by a large number of interacting and interdependent elements in which there is no central control. Patterns of change emerge from rapid, real-time interactions that generate learning, evolution, and development—if one is paying attention and knowledge of how to observe and capture the important and emergent patterns. Complex environments for social interventions and innovations are those in which what to do to solve problems is uncertain and key stakeholders are in conflict about how to proceed.

Developmental evaluation involves real-time feedback about what is emerging in complex dynamic systems as innovators seek to bring about systems change. Participants will learn the unique niche of developmental evaluation and what perspectives such as Systems Thinking and Complex Nonlinear Dynamics can offer for alternative evaluation approaches.

Participants will receive a copy of the instructor’s text, Developmental Evaluation: Applying Complexity Concepts to Enhance Innovation and Use (Guillot 2010).

Evaluational Assessment

Instructor: Debra J. Rog, PhD, TEI Associate Director of Faculty Affairs; Vice President, Westat Inc.; President, The Rockville Institute

Description: Increasingly, both public and private funders are looking to evaluation not only as a tool for determining the accountability of interventions, but also to add to our evidence base on what works in particular fields. With scarce evaluation resources, however, funders are interested in targeting those resources in the most judicious fashion and with the highest yield. Evaluational assessment is a tool that can inform decisions on whether a program or initiative is suitable for an evaluation and the type of evaluation that would be most feasible, credible, and useful.

This course will provide students with the background, knowledge, and skills needed to conduct an evaluationally assessment. Using materials and data from actual E4 studies and programs, students will participate in the various stages of the method, including the assessment of the logic of a program’s design and the consistency of its implementation; the assessment of the feasibility, validity, and appropriateness of existing measurement and data capacities; the analysis of the plausibility that the program/initiative can achieve its goals; and the assessment of appropriate options for either evaluation of the program, improvement of the program design/implementation, or strengthening the measurement. The development and analysis of logic models will be stressed, and an emphasis will be placed on the variety of products that can emerge from these analyses.

Students will be sent several articles prior to the course as a foundation for the method.

Prerequisites: Background in evaluation is useful and desirable, as is familiarity with conducting program-level site visits.

Evaluating Training Programs: Frameworks and Fundamentals

Formerly taught as Evaluating Training Program Tutorials and Coaching Components, Supportive Technical Assistance; and Reporting

Description: This course provides students with the background, knowledge, and skills needed to conduct an evaluationally assessment. Using materials and data from actual E4 studies and programs, students will participate in the various stages of the method, including the assessment of the logic of a program’s design and the consistency of its implementation; the assessment of the feasibility, validity, and appropriateness of existing measurement and data capacities; the analysis of the plausibility that the program/initiative can achieve its goals; and the assessment of appropriate options for either evaluation of the program, improvement of the program design/implementation, or strengthening the measurement. The development and analysis of logic models will be stressed, and an emphasis will be placed on the variety of products that can emerge from these analyses.

Students will be sent several articles prior to the course as a foundation for the method.

Prerequisites: Background in evaluation is useful and desirable, as is familiarity with conducting program-level site visits.

Evaluating Training Programs: Frameworks and Fundamentals

Instructor: Debra J. Rog, PhD, TEI Special Projects Director, Research Proposal Project, Claremont Graduate University

Description: The evaluation of training programs typically emphasizes participants’ initial acceptance and reaction to training content; learning, knowledge, and skill acquisition; participant performance and behavioral application of training; and benefits at the organizational and societal levels that result from training participation. The evaluation of training programs especially behavioral application of content and organizational benefits from training continue to be an evaluation challenge. Today’s training programs are offered in multiple formats, including classroom presentations, self-directed online study courses, online tutorials and coaching components, supportive technical assistance, and so forth. Evaluation approaches must be sufficiently flexible to accommodate training modalities and the individual and organizational outcomes that result from training efforts.

The Kirkpatrick (1959, 1976) training model has been a longstanding evaluation approach; however, it is not without criticism or suggested modification. The course provides an overview of two training program evaluation frameworks: 1) the Kirkpatrick model and modifications, which emphasizes participant reaction, learning, behavioral application, and organizational benefita), and 2) the Concerns-based Adoption Model (CBAM), a diagnostic approach that assesses stages of participant concern about how training will affect individual job performance, describes how training will be configured and practiced within the workplace, and gauges the actual level of training use. The course is designed to be interactive and to provide a practical approach for planning (those leading or commissioning training evaluations), implementing, conducting, or managing training evaluations. The course covers an overview of training evaluation models; pre-training assessment and training program expectations; training evaluation planning; development of the Kirkpatrick model; and measures; training evaluation design; data collection—instrumentation and administration, data quality, reporting process, change, and results; and disseminating findings and recommendations. Case examples will be used throughout the course to illustrate course content.

Internal Evaluation: Building Organizations From Within

Instructor: Arnold Love, PhD, internationally recognized independent consultant based in Toronto, Canada

Description: Internal evaluations are conducted by an organization’s own staff members rather than by outside evaluators. Evaluators have the enormous advantage of an insider’s knowledge so they can readily focus evaluations on areas managers and staff know are important, develop systems that spot problems before they occur, constantly evaluate ways to improve services and processes, strengthen accountability for results, and build organizational learning that empowers staff and program participants alike. This course begins with the fundamentals of designing and managing evaluation, internal evaluation, including an examination of internal evaluation with its advantages and disadvantages, understanding internal evaluation within the organizational context, recognizing both positive and potentially negative roles for internal evaluators, defining the tasks of managers and evaluators, identifying the major steps
For certain types of evaluation questions, more complex statistical techniques need to be considered. More complex techniques to be discussed (again, at a conceptual level) include: (1) structural equation modeling, (2) multi-level modeling, and (3) cluster analysis and other classificatory techniques.

Examples of methods of learning from data—e.g., for "snoping" with validity, for making new discoveries in complex data, etc.—will include: (1) planned and unplanned tests of moderation, (2) graphical methods for unequal treatment effects, (3) use of previously-mentioned techniques such as clustering and (4) identifying and describing converging patterns of evidence, and (5) iterating between findings and explorations. Each participant will receive a set of readings and current support materials.

Prerequisites: Familiarity with basic statistics.

Measuring Performance and Managing for Results in Government and Nonprofit Organizations

Formerly taught as Performance Measurement for Government and Nonprofit Organizations

Instructor: Theodore H. Poister, PhD, Professor of Public Management & Policy, Andrew Young School of Policy Studies, Georgia State University

Description: A commitment to performance measurement has become pervasive throughout government, the nonprofit sector, foundations, and other nongovernmental organizations in response to demands for increased accountability, pressures for improved quality and customer service, and mandates to "do more with less," as well as the drive to strengthen the capacity for results-oriented management among professional public administrators.

While the idea of setting goals, identifying and monitoring measures of success in achieving them, and using the resulting performance information in a variety of decision venues might appear to be a straightforward process, a myriad of conceptual, political, managerial, cultural, psychological, and organizational constraints—as well as serious methodological issues—make this a very challenging enterprise. This course will provide an overview of methods for learning from data, including methods for reducing the potential for bias and threats to validity, practical steps for organizing the internal evaluation function, specific skills the internal evaluator needs, strategies to build internal evaluation capacity in your organization, and ways for building links between internal evaluation and organizational development. Teaching will be interactive, combining presentations with opportunities for participation and discussion. Time will be set aside on the second day for an in-depth discussion of key issues and concerns raised by participants. The instructor’s book on Internal Evaluation: Building Organizations From Within (Sage 1993) is provided with other resource materials.

Linking Evaluation Questions to Analysis Techniques

Instructor: Melvin M. Mark, PhD, Professor of Psychology at Pennsylvania State University

Description: Statistics are a mainstay in the toolkit of program and policy evaluators. Human memory being what it is, however, even evaluators with reasonable statistical training, over the years, often forget the basics. And the basics aren't always enough. If evaluators are going to make sensible use of consultants, communicate effectively with funders, and understand others’ evaluation reports, then they often need at least a conceptual understanding of statistical principles, and for more persuasive reporting of findings—will include: (1) planned and unplanned tests of moderation, (2) graphical methods for unequal treatment effects, (3) use of previously-mentioned techniques such as clustering and (4) identifying and describing converging patterns of evidence, and (5) iterating between findings and explorations. Each participant will receive a set of readings and current support materials.

Prerequisites: Familiarity with basic statistics.

Managing Performance and Capacity for Results in Government and Nonprofit Organizations

Formerly taught as Performance Measurement for Government and Nonprofit Organizations

Instructor: Theodore H. Poister, PhD, Professor of Public Management & Policy, Andrew Young School of Policy Studies, Georgia State University

Description: A commitment to performance measurement has become pervasive throughout government, the nonprofit sector, foundations, and other nongovernmental organizations in response to demands for increased accountability, pressures for improved quality and customer service, and mandates to "do more with less," as well as the drive to strengthen the capacity for results-oriented management among professional public administrators.

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Resource Evaluation and Systems Change

Instructor: Doreen Cavanaugh, PhD, Research Professor at the Health Policy Institute, Georgetown Public Policy Institute, Georgetown University

Description: Worldwide financial crises challenge evaluators to examine efficiency as well as the effectiveness of the programs and interventions implemented to effect favorable systems change. This course looks under a microscope by examining three essential infrastructure elements of successful program effort—collaboration, leadership, and resource allocation—and the methods used to evaluate them. The need to do more with less has increased the value of and emphasis on maximizing performance and results. Improved collaboration across participating stakeholders is one potential way of achieving both program efficiency and effectiveness. Existing studies identify that groups form partnerships by engaging in four increasingly complex activities: networking, coordination of services or resources, cooperation, and, finally, collaboration. This course discusses each of these activities, their similarities, and differences and their contributions to project/program outcomes, and methods for evaluating them.

We know that collaborative frameworks yield new styles of leadership and, as a consequence, the need for new evaluation approaches. Often found, hierarchical top-down management models give way to an array of new stakeholder positions—change champions and boundary-spanners, individuals who can manage across organizational boundaries, each contributing to the outcome and impact of a project or program. This course will provide participants with an understanding of differing leadership styles, linking the style to the project/program objectives, with an emphasis on methods of evaluating the effect of leadership on intermediate and long-term program/program outcomes.

Today, efficient and effective systems change often requires a reallocation of human and financial resources and the need to examine efficiency as well as the effectiveness of the programs and interventions implemented to effect favorable systems change. This course offers the opportunity for participants to learn from someone who is a successful evaluation consultant for 30 years. Issues addressed include: What does it take to establish an independent consulting practice? How do you find your consulting niche? How do you attract clients? How do you determine how much to charge, create collaborations, and generate return business? Included will be discussion on such topics as marketing, pricing, bidding on contracts, managing projects, resolving conflicts, professional ethics, and client satisfaction. Participants will be invited to share their own experiences and seek advice on situations they’ve encountered. The course is highly interactive and participant-focused.


Using Evaluation Strategies and Capacity

Instructor: Leona Ba, PhD, International development consultant

Description: This class offers the opportunity for participants to learn from someone who is a successful evaluation consultant for 30 years. Issues addressed include: What does it take to establish an independent consulting practice? How do you find your consulting niche? How do you attract clients? How do you determine how much to charge, create collaborations, and generate return business? Included will be discussion on such topics as marketing, pricing, bidding on contracts, managing projects, resolving conflicts, professional ethics, and client satisfaction. Participants will be invited to share their own experiences and seek advice on situations they’ve encountered. The course is highly interactive and participant-focused.

Participants will receive a copy of the instructor’s text: Essentials of Utilization-Focused Evaluation (Sage 2012).
Implementation Analysis for Feedback on Program Progress and Results
Instructor: Arnold Love, PhD, Internationally recognized independent consultant based in Toronto, Canada
Description: Many programs do not achieve intended outcomes because of how they are implemented. Thus, implementation analysis (IA) is very important for policy and funding decisions. IA fills the methodological gap between outcome evaluations that treat a program as a “black box” and process evaluations that present a flood of descriptive data. IA provides essential feedback on the “critical ingredients” of a program and helps drive change through an understanding of factors affecting implementation and short-term results. Topics include importance of IA; conceptual and theoretical foundations of IA; how IA drives change and complements other program evaluation approaches; major models of IA and their strengths/weaknesses; how to build an IA framework and select appropriate IA methods; concrete examples of how IA can keep programs on track, spot problems early, enhance outcomes, and strengthen collaborative ventures; and suggestions for employing IA in your organization. Detailed course materials and in-class exercises are provided.

Making Evaluation Data Actionable
Formerly taught as “Actionable” Data for Complex Service Systems: Benchmarking/Standards Setting
Instructor: Ann M. Doucette, PhD., TEI Special Projects Director, Research Professor, Claremont Graduate University
Description: Interventions and programs are implemented in complex environments that present challenges for collecting program performance information. A general problem for performance measurement initiatives—and what often causes them to 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 that can be linked directly to improved outcomes and sustained impact. This class introduces complex adaptive systems (CAS) thinking and addresses the implication of CAS in evaluating the outcomes and impact of interventions and programs. Examples used in this course include education, transportation, safety, developing countries, and research and development environments. The class examines performance measurement strategies that support actionable data. The focus will be on data-based decision making, value-based issues, and practice-based evidence that can assist in moving performance measurement and quality monitoring activities from a process, outcome, and impact evaluation approach to continuous quality improvement. Business models such as Toyota Production System, Six-sigma, Balanced Scorecards, as well as knowledge management and benchmarking strategies, will be discussed in terms of how they can inform improvement strategies.

Note: Persons with some experience in program evaluation and those with interest in a practice-based perspective will likely derive the most benefit from this course.

Presenting Data Effectively: Practical Methods for Improving Evaluation Communication
Instructor: Gwende Evergreen, PhD, Speaker, designer, and independent evaluator
Description: Crystal clear charts and graphs are valuable. They save an audience’s mental energies, keep a reader engaged, and make you look smart. In this course, attendees will learn the science behind presenting data effectively. We will go behind-the-scenes in Excel and discuss how each part of a visualization can be modified to best tell the story in a particular dataset. We will discuss how to choose the best chart type given audience needs, cognitive capacity, and the story that needs to be told about the data. This includes both quantitative and qualitative visualizations. We will walk step-by-step through how to create newer types of data visualizations and how to manipulate the default settings to customize graphs so that they have a more powerful impact. Working in a computer lab, attendees will build with a prepared spreadsheet to learn the secrets to becoming an Excel data ninja. Attendees will get hands-on practice implementing direct, practical steps that can be immediately implemented after the workshop to clarify data presentation and support clearer decision-making. Full of guidelines and examples, after this workshop you will be better able to package your data so it represents your smart, professional quality.

Note: Attendees are strongly encouraged to maximize the workshop experience by bringing a spreadsheet with charts under current construction.

Attendees will learn:
- Visual processing theory and why it is relevant for evaluators
- How to apply graphic design best practices and visual processing theory to enhance data visualizations with simple, immediately implementable steps
- Which chart type to use and when
- How to construct data visualizations and other evaluation communication materials to help the audience understand the data
- Alternative methods for reporting

Workshop attendees will leave with helpful handouts and a copy of Effective Data Visualization (Sage, 2016).

Project Management and Oversight for Evaluators
Formerly taught as Management for Evaluators and Those With Oversight Responsibility
Instructor: Tassie Catsambas, Co-founder of EnCompass LLC, CEO/CFO
Description: The purpose of this course is to provide new and experienced evaluation professionals and funders with strategies, tools, and skills to: (1) develop realistic evaluation plans; (2) negotiate needed adjustments when issues arise; (3) organize and manage evaluation teams; (4) monitor evaluation activities and budgets; (5) protect evaluation independence and rigor while responding to client needs; and (6) ensure the quality of evaluation products and briefings.

Evaluation managers have a complex job: They oversee the evaluation process and are responsible for safeguarding methodological integrity, evaluation activities, and budgets. In many organizations, they also manage people, including clients, various stakeholders, and other evaluation team members. Evaluation managers shoulder the responsibility for the success of the evaluation, frequently dealing with unexpected challenges and making decisions that influence the quality and usefulness of the evaluation.

Against a backdrop of demanding technical requirements and a dynamic political environment, the goal of evaluation managers is to design, develop, and implement useful evaluation resources and time, valid and useful measurement information and findings and ensure the quality of the process, products, and services included in the contract. Management decisions influence methodological decisions and vice versa, as method choice has cost implications.

The course methodology will be experiential and didactic, drawing on participants’ experience and engaging them with diverse material. It will include paper and online tools for managing teams, work products, and clients; an in-class, simulation game with expert judges; case examples; reading; and a master checklist of processes and sample forms to organize and manage an evaluation effectively. At the end of this training, participants will be prepared to follow a systematic process with support tools for commissioning and managing evaluations and will feel more confident to lead evaluation teams and negotiate with clients and evaluators for better evaluations.

Strategy Mapping
Instructor: John Bryson, PhD, McVintor Presidential Professor of Planning & Public Affairs, Hubert H. Humphrey Institute of Public Affairs, University of Minnesota, Minneapolis
Description: The world is often a muddled, complicated, dynamic place in which it seems as if everything connects to everything else— and that is the problem! The connections can be problematic because, while we know things are connected, sometimes we do not know how, or else there are so many connections we cannot understand them all. Alternatively, we may not realize how connected things are and our actions lead to unforeseen and unhappy consequences. Either way, we would benefit from an approach that helps us strategize, problem solve, manage conflict, and design evaluations that help us understand how connected the world is, what the effects of those connections are, and what might be done to change some of the connections and their effects.

Visual strategy mapping (ViSM) is a simple and useful technique for addressing situations where thinking as an individual or as a group-matters. ViSM is a technique for linking strategic thinking, acting, and learning; helping make sense of complex problems; communicating to oneself and others what might be done about them; and also managing the inevitable conflicts that arise.

ViSM makes it possible to articulate a large number of ideas and their interconnections in a way that people can know what to do, what to address, and how to do it, and why. The technique is useful for formulating and implementing mission, goals, and strategies and for being clear about how to evaluate strategies. The bottom line is: ViSM is one of the most powerful strategic management tools in existence. ViSM is what to do when mapping help? When there are a number of situations that are tailor-made for mapping. Mapping is particularly useful when:
- Effective strategies need to be developed
- Persuasive arguments are needed
- Effective and logical communication is essential
- Effective understanding and management of conflict are needed
- It is vital that a situation be understood better as a prelude to any action
- Organizational or strategic logic needs to be clarified in order to design a program or how to do it

These situations are not meant to be mutually exclusive. Often they overlap in practice. In addition, mapping is very helpful for creating business models and balanced scorecards and dashboards. Visual strategy maps are related to logic models, as both are word-and-arrow diagrams, but are more tied to goals, strategies, and actions and are more careful about articulating causal connections.

Objectives: (Strategy Mapping)
At the end of the course, participants will:
- Understand the theory of mapping
- Know the difference between action-oriented strategy maps, business model maps, and balanced scoredcards and maps
- Be able to create action-oriented strategy maps for individuals— that is, either for oneself or by interviewing another person
- Be able to create action-oriented maps for groups

When
Analytic Approaches

Applied Regression Analysis for Evaluators (computer lab)

Instructor: Theodore H. Poister, PhD, Professor of Public Management & Policy, Andrew Young School of Policy Studies, Georgia State University

Description: In this class, students will become familiar with a set of statistical tools that are often used in program evaluation, with a strong emphasis on appropriate application of techniques and interpretation of results. It is designed to “demystify” statistics and clarify how and when to use particular techniques. While the principal concern focuses on practical applications in program evaluations rather than the mathematical support underlying the procedures, a number of formulas and computations are covered to help students understand the logic of how the statistics work. Topics include introduction to data analysis; simple descriptive statistics; examination of statistical relationships; the basics of statistical inference from sample data; two sample t-tests; chi-square and associated measures; analysis of variance; and an introduction to simple and multiple regression analysis.

Students will learn how to generate a wide variety of tables and graphs for presenting results, and a premium will be placed on clear presentation and interpretation of results. This “hands-on” class is conducted in a computer lab in which each participant has a computer for running statistical procedures on a wide range of real-world data sets using SPSS software. However, no prior knowledge of statistics or SPSS is required. Participants will have the opportunity to estimate multivariate regression models on cross-sectional data; diagnose the results to determine if they may be misleading; and test the effects of program participation with pretest-posttest and posttest-only data. Regression-based procedures for testing mediated and moderated effects will be covered. On the third day, students will be given the opportunity to conduct an independent analysis and write up the findings. Both peer feedback and instructor feedback will be provided to build skills in interpreting findings and explaining them to interested audiences.

Participants will use SPSS software to compute regression analyses and will be given the opportunity to apply it on data from an actual evaluation. Students and instructor will work on interpreting the results and determining how to present them to evaluation audiences. The class will be in a lab where each person has a computer for application of content.

Intermediate Cost-Benefit and Cost-Effectiveness Analysis

Instructor: Joseph Cordes, Associate Director, Trachtenberg School of Public Policy & Public Administration; Professor of Economics, Public Policy & Public Administration, & International Affairs, The George Washington University

Description: The Intermediate Cost-Benefit and Cost-Effectiveness Analysis course provides a more advanced and detailed review of the principles of social cost and social benefit estimation than is provided in TEI’s Introduction to Cost-Benefit and Cost-Effectiveness Analysis. Working with the instructor, students will have the opportunity to estimate the costs and benefits of actual programs in the computer lab. The objective is to develop the ability both to critically evaluate and use cost-benefit analyses of programs in the public and nonprofit sectors and to use basic cost-benefit analysis tools to actively undertake such analyses.

Topics covered in the course will include:

Principles of Social Cost and Social Benefit Estimation

- Social Cost Estimation: (a) Components (capital, operating, administrative) (b) Budgetary and Social Opportunity Cost
- Social Benefit Estimation: (a) Social vs. private benefit. (b) Revealed benefit measures (price/cost changes in primary market, price/cost changes in analogous markets, benefits inferred from market-trade-offs, and cost/damages avoided as benefit measures)
- Stated preference measures: Inferring benefits from survey data
- Benefit/Cost Transfer: Borrowing estimates of benefits and costs from elsewhere

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Timing of Benefits and Costs: (a) Discounting and net present value, (b) Dealing with inflation, (c) Choosing a discount rate

Presenting Results: (a) Sensitivity analysis (partial sensitivity analysis, best/worst case scenarios, break-even analysis, and Monte-Carlo analysis), (b) Present value of net social benefits, (c) Benefit Cost Ratio, (d) Internal rate of return

Social Cost and Social Benefit Estimation in Practice

The use of the above principles of cost and benefit estimation will be illustrated using data drawn from several actual benefit cost analysis of real programs. The cases will be chosen to illustrate the application of the benefit/cost estimation principles in the case of social programs, health programs, and environmental programs. Working with the instructor in the computer lab, students will create a benefit-cost analysis template and then use that template to estimate social benefits and social costs and to present a benefit-cost bottom line. This is an intermediate-level course. Participants are assumed to have some knowledge or experience with cost-benefit and/or cost-effectiveness analysis equivalent to the TEI course Introduction to Cost-Benefit and Cost-Effectiveness Analysis.

Needs Assessment

Instructor: Ryan Watkins, PhD, Professor at The George Washington University

Description: The initial phase of a project or program is among the most critical in determining its long-term success. Needs assessments supports this initial phase of project development with proven approaches to gathering information and making justified decisions. In a two-day workshop, learn how needs assessment tools and techniques help you identify, analyze, prioritize, and accomplish the results you really want to achieve. Filled with practical strategies, tools, and guides, the workshop covers both large-scale, formal needs assessments and less-formal assessments that guide daily decisions. The workshop blends rigorous methods and realistic tools that can help you make informed and reasoned decisions. Together, these methods and tools offer a comprehensive, yet realistic, approach to identifying needs and selecting among alternative paths forward.

In this course, we will focus on the pragmatic application of many needs assessment tools, giving participants the opportunity to practice their skills while learning how needs assessment techniques can improve the achievement of desired results. With participants from a variety of sectors and organizational roles, the workshop will illustrate how needs assessments can be of value in a variety of operational, capacity development, and staff learning functions.

Practical Meta-Analysis: Summarizing Results Across Studies

Instructor: David B. Wilson, PhD, Professor in the Department of Criminology, Law & Society at George Mason University

Description: Meta-analysis is a technique for encoding, analyzing, and summarizing quantitative findings from research studies. It is used by applied researchers and evaluators to review, synthesize, and interpret existing research on such topics as effects of intervention, assessment of change, differentiation of diagnostic or demographic groups, relationships between risk variables and subsequent behavior, and reliability and validity of measurement instruments. This course will provide practical instruction on how to conduct meta-analysis, including (a) specifying the problem and gathering relevant studies, (b) coding procedures, (c) database structures, (d) analyzing meta-analytic databases, and (e) interpreting meta-analysis results. Participants will be given a detailed guide for conducting meta-analysis and a computer disk with applicable software. On the first day procedures will be explained and implementations discussed. On the second day, hands-on applications of analytic techniques will occur with participant access to individual computers. Problems provided sufficiently in advance by participants will be incorporated into class discussion, or if more appropriate, consultation provided after class hours.

Qualitative Data Analysis

Instructor: Patricia Rogers, PhD, Professor in Public Sector Evaluation at RMIT University (Royal Melbourne Institute of Technology), Australia

Description: Many evaluators find it challenging to analyze textual, visual, and aural data from interviews, diaries, observations, and open-ended questionnaire items in ways that are rigorous but practical within the time and staffing constraints of real evaluation. Analysis of qualitative data can range from simple enumeration and illustrative use to more detailed analysis requiring more expertise and time. In this class, participants will work through a structured approach to analyzing qualitative data based on an iterative process of considering the purpose of the analysis, reviewing suitable options, and working through interpretations. Techniques include grouping, summarizing, breaking patterns, discovering relationships, and developing and testing relationships. The session will address practical and ethical issues in analyzing and reporting qualitative data—particularly who participates in interpretation, how confidentiality can be maintained, and what can be tracked and checked, and standards for good practice in qualitative data analysis. Hands-on exercises for individuals and small groups will be used throughout the class. Manual analysis of data will be used in exercises and participants will also be introduced to NVivo and other computer packages to assist analysis. As part of the course, participants will receive the textbook Qualitative Data Analysis by Miles, Huberman and Saldana (Sage 2014).

Intermediate Qualitative Data Analysis

Instructor: Delwyn Goodrick, PhD, Evaluation practitioner/psychologist, Melbourne, Australia

Description: Data analysis involves creativity, sensitivity, and rigour. In its most basic form, qualitative data analysis involves some sort of labeling, coding, and clustering in order to make sense of data collected from evaluation fieldwork, interviews, and/or document analysis. This intermediate-level workshop builds on basic coding and categorizing familiar to most evaluators, and extends the array of strategies available to support rigorous interpretations.

This workshop presents an array of approaches to support the analysis of qualitative data with an emphasis on procedures for the analysis of interview data. Strategies such as thematic analysis, pattern matching, template analysis, process tracing, schema analysis, and qualitative comparative analysis are outlined and illustrated with reference to examples from evaluation and from a range of disciplines, including sociology, education, political science, and psychology.

The core emphasis in the workshop is creating awareness of heuristics that support selection and application of appropriate analytic techniques that match the purpose of the evaluation, type of data, and practical considerations such as resource constraints. While a brief overview of qualitative analysis software is provided, the structure of the workshop focuses on analysis using manual methods. A range of activities to support critical thinking and application of principles is integrated within the workshop program.

Qualitative data analysis and writing go hand in hand. In the second part of the workshop, strategies for transforming analysis through processes of description, interpretation, and judgment will be presented. These issues are particularly important in the assessment of the credibility of qualitative data as evidence by evaluation audiences. Issues of quality, including validity, trustworthiness, and authenticity of qualitative data are integrated throughout the workshop.

This is an intermediate-level course. Participants are assumed to have some knowledge or experience with qualitative data. Participants will receive Qualitative Data Analysis: Practical Strategies by Patricia Bazeley (Sage 2013) to support learning within and beyond the workshop.

Specific issues to be addressed:

What are the implications of an evaluator’s worldview for selection of qualitative data analysis (QDA) strategies?

Are there analytic options that are best-suited to particular kinds of qualitative data?

How can participant experiences be portrayed through QDA without fracturing the data through formal coding?

What types of analysis may be appropriate for particular types of evaluation (program theory, realist, transformative)?

What strategies can be used to address interpretive dissent when working in evaluation teams?

What are some ways that qualitative and quantitative findings can be integrated in an evaluation report?

How can I sell the value of qualitative evidence to evaluation audiences?
Through a balanced curriculum and high-quality instruction from experts in the field, TEI emphasizes practical relevance for practicing evaluators.

We invite you to join us to expand the skills you need today to face the challenges you will face tomorrow.