



**Crossing Borders,
Crossing Boundaries**
2005 Joint CES/AEA Conference

**Franchir les frontières,
repousser les limites**
Congrès conjoint SCÉ/AEA 2005

OCTOBER 24-30, 2005 | SHERATON CENTRE • TORONTO • ONTARIO • CANADA

<http://c2005.evaluationcanada.ca>

EVALUATION 2005 REGISTRATION PAMPHLET

We live in a world of boundaries and borders – geographic borders, disciplinary boundaries, and intellectual territoriality. Competing models, professional jargon and alternative frameworks sometimes divide us – as do perspectives, contexts, cultures, politics, values, and experiences. These differences also provide opportunities for cross-fertilization and possibilities for thinking about evaluation in new ways as we share diverse experiences and perspectives.

Boundaries and borders are human constructions. They can be and often are functional. While they sometimes create barriers to mutual understanding and communication, crossing borders and boundaries can offer opportunities for new syntheses, hybrid creations and creative partnerships. In the interest of the further development of the evaluation profession and international collaboration, the theme for the 2005 Joint CES/AEA Evaluation Conference in Toronto is:

**Crossing Borders,
Crossing Boundaries**

*J. Bradley Cousins,
Michael Q. Patton
Program co-chairs*

 **M E S S A G E S**

Message from Carl Doucette, CES President

On behalf of the National Council of the Canadian Evaluation Society (CES), it is my pleasure to welcome you to this joint CES/AEA 2005 Conference.

This is the second joint conference that CES has had the opportunity of co-hosting with the American Evaluation Association (AEA) with the first one being in 1995 in Vancouver, British Columbia. The first joint conference is considered by many evaluation practitioners and academics to have played a very significant role in the international development of evaluation. I am confident that the 2005 Joint Conference will also play a pivotal role in shaping the future of evaluation both in North America and internationally. This conference also contributes significantly to the vision of CES as a leader in Canada in the field of evaluation and a major contributor in the global evaluation community.

The conference theme of cultural and cross-cultural influences on evaluation is particularly relevant within the context of our global society and internationalization in the field of evaluation. CES is pleased that this conference is taking place in Toronto, a city known and respected internationally for its rich cultural diversity.

I would like to thank the conference co-chairs, Dr. Arnold Love and Dr. Jean King, and the program co-chairs, Dr. Brad Cousins and Dr. Michael Patton, and their dedicated committee members for organizing a conference that incorporates the conference theme in a very dynamic manner. Thanks also to Jim Cullen, Canadian program co-chair (francophone), who looked after the interests of our French-language colleagues. This conference will provide delegates with many opportunities and venues to learn, to share and to network with colleagues and fellow delegates.

I would also like to thank the CES Ontario Chapter and in particular the Local Arrangements Committee for their work in planning and implementing all of the activities related to hosting the conference.

I look forward to joining Sharon Rallis, AEA President in many activities and events throughout the conference proceedings. The supportive and close relationship between CES and AEA is clearly evident through our willingness and ability to work in partnership in the planning of this joint conference.

My wish is that this joint conference will provide delegates with a very beneficial professional experience and a deeper understanding of the cultural and cross-cultural influences on evaluation. It is my hope that delegates will use the knowledge and insights gained during the conference to improve the human condition in our global society.

2005 JOINT CES/AEA CONFERENCE

CROSSING BORDERS, CROSSING BOUNDARIES



Message from Sharon F. Rallis, AEA President

Welcome to the CES/AEA 2005 Conference. On behalf of the AEA Board of Directors, I extend our heartfelt welcome to the annual conference, this year co-hosted and planned in collaboration with the Canadian Evaluation Society (CES). The theme of this conference, *Crossing Borders; Crossing Boundaries*, recognizes much more than the geographic border between our countries. In addition to raising multiple conceptualizations of the terms border and boundary, the theme also marks the international growth and development of evaluation. Presenters represent more than forty nations of the world.

Thanks to the program co-chairs, Michael Patton and Brad Cousins, and to the conference co-chairs, Jean King and Arnold Love, you have a plethora of opportunities from which to select: panels, papers, plenaries, posters, receptions, general meetings – as well as innumerable informal and serendipitous gatherings. Their imagination, perseverance, coordination, and organization have made this all happen. Our location, the Sheraton Centre Hotel, offers many and varied spaces to connect with new acquaintances or catch up with old friends.

While the first CES and AEA joint conference occurred a decade ago, our collaboration extends even further back. In fact, I recently found a paper I presented at one of the first annual conferences I attended as a fledgling evaluator; the conference was also in Toronto, Evaluation '85, a Joint Meeting of the Canadian Evaluation Society, the Evaluation Network, and Evaluation Research Society. (In 1986, the latter two associations joined as AEA.) Now, twenty years later, I am deeply honored to be co-presiding in Toronto at this event that celebrates the on-going border-crossing of our two professional associations, and I look forward to joining Carl Doucette, CES National President, in various conference events.

The city of Toronto is an especially appropriate location for this conference. It ranks as the city with the most ethnically and culturally diverse population in the world. A walk down the streets or across the many parks or through the underground PATH walkway, all accessible from the hotel, will reveal the people, shops, restaurants of the city. I encourage you to take a break from conference sessions to enjoy some of the city's offerings. I offer my appreciation to the Local Arrangements Committee and the CES Ontario Chapter for their efforts to facilitate a wonderful visit.

I hope that your experience at the conference will be both professionally and personally meaningful and rewarding. May you engage in dialogue and gain insights that inform your evaluations so that they may in turn contribute to social betterment and to the global evaluation-community's body of knowledge. And don't forget to eat well. Let the border and boundary-crossing begin!

Message from Arnold Love, Conference Co-Chair (CES)

On behalf of the CES Ontario Chapter and its Local Arrangements Committee team, I would like to extend a warm welcome to all Conference delegates, especially our colleagues and friends from AEA and our many guests from around the world. Toronto is renowned for its ethnic diversity, fine restaurants, and charming neighbourhoods. The Sheraton Centre is located right in the heart of Toronto's entertainment district, affording convenient opportunities to network, relax and enjoy a meal together. If you have a question about Toronto or if we can help you in some way, just ask. Welcome to Toronto!

Message from Jean King, Conference Co-Chair (AEA)

With a powerful combination of pride and glee, I join my colleagues in welcoming you to this joint CES/AEA conference, which we hope will accord you days of intellectual stimulation, high quality experiences, and plentiful networking opportunities. The list of people to thank for its creation is a long one – and I intend to personally thank as many individuals as I can – but we must collectively celebrate the collaboration of our two organizations that have, after a decade, again given us reason to meet face to face. In the words of our informal AEA toast, here's to evaluation and the friends it brings together! May each of us come to Toronto ready to learn and eager to share our expertise.



PROGRAM

The Evaluation 2005 Conference program includes over 580 sessions. Your conference registration includes admittance to any session taking place between 3:15 pm on Wednesday, October 26 and 5:00 pm on Saturday, October 29, with the exceptions of the Steam Whistle Brewery social on Thursday and the Joint CES/AEA Luncheon on Friday which require separate tickets.

Professional development workshops precede and follow the conference on Monday, Tuesday and Wednesday before 3:00 pm and Sunday morning. These workshops require a separate fee to attend. You need not attend the conference to register for a professional workshop.

A searchable draft version of the program, with abstracts, will be available on the web in mid July. The hardcopy program will be distributed on site as part of your registration and includes session titles and presenter names, but no abstracts.

Thematic Strand

In the interest of the further development of the evaluation profession and international collaboration, the theme for the 2005 Joint CES/AEA Evaluation Conference in Toronto is: *Crossing Borders, Crossing Boundaries*. Competing models, professional jargon, and alternative frameworks sometimes divide us – as do perspectives, contexts, cultures, politics, values, and experiences. These differences also provide opportunities for cross-fertilization and possibilities for thinking about evaluation in new ways as we share diverse experiences and perspectives. The conference theme will be highlighted in a strand of specific thematic sessions as well as incorporated into the content of many sessions spread throughout the conference.



CONFERENCE SCHEDULE OUTLINE

Canadian Strand

Crossing Borders, Crossing Boundaries provides an excellent backdrop for discussion, dialogue and deliberation about issues and questions of particular interest to evaluation in the Canadian context. To that end, one Canadian Strand session will be scheduled in each of the conference concurrent session time slots. These high-profile sessions are reserved for theme-based exchanges of relevance to evaluation in the Canadian context.

Topical Interest Group Strands

Thirty-five Topical Interest Groups (TIGs), and a French-language review team, participated in proposal reviews and developed topical or language-based strands for the conference. TIGs are sub-groups of AEA comprised of people with a common interest in an area of evaluation theory, practice, or the profession. CES representatives participated in the TIG review process.

French-Language Strand

Evaluation 2005 is a dual-language conference. The French-language sessions selected for the program have been combined to form a French-language strand woven throughout the conference or incorporated into the Canadian Strand. Most French-language sessions will have simultaneous translation into English available.

SCHEDULE

A complete draft conference program will be available online at <http://c2005.evaluationcanada.ca> in mid July. The online program is searchable and includes descriptions for each session. The hard-copy program will be distributed at the conference. At the right, you will find an outline of the conference schedule. Full descriptions of the 50 professional development workshops that precede and follow the conference are contained in this document.

Monday, October 24, 2005

8:00 am – 5:30 pm Registration Desk Open
9:00 am – 4:00 pm Professional Development Workshops

Tuesday, October 25, 2005

8:00 am – 7:00 pm Registration Desk Open
9:00 am – 4:00 pm Professional Development Workshops

Wednesday, October 26, 2005

7:00 am – 7:00 pm Registration Desk Open
8:00 am – 5:00 pm Exhibits Open
8:00 am – 3:00 pm Professional Development Full-Day Workshops
8:00 am – 11:00 am Professional Development Half-Day Morning Workshops
12:00 pm – 3:00 pm Professional Development Half-Day Afternoon Workshops
3:15 pm – 4:15 pm Opening Plenary
4:30 pm – 6:00 pm Concurrent Sessions
6:10 pm – 6:40 pm First Time Attendee Orientation Session
6:30 pm – 8:00 pm Reception, Posters, Information Tables and Meet the Authors
8:00 pm – 9:00 pm Student Reception

Thursday, October 27, 2005

7:00 am – 6:30 pm Registration Desk Open
7:00 am – 6:30 pm Career Center Open
8:00 am – 5:00 pm Exhibits Open
8:00 am – 9:10 am Keynote Address: Sheila Fraser, Auditor General of Canada
9:25 am – 10:55 am Concurrent Sessions
11:05 am – 12:35 pm Concurrent Sessions
12:45 pm – 1:30 pm CES Annual General Meeting / AEA Business Meeting
1:40 pm – 3:10 pm Concurrent Sessions
3:20 pm – 4:50 pm Concurrent Sessions
5:00 pm – 6:00 pm Concurrent TIG Business Meetings
6:30 pm – 10:00 pm Steam Whistle Brewery Social Evening

Friday, October 28, 2005

7:00 am – 6:30 pm Registration Desk Open
7:00 am – 6:30 pm Career Center Open
8:00 am – 5:00 pm Exhibits Open
8:00 am – 9:10 am Keynote Address: Roberta Jamieson, CEO National Aboriginal Achievement Foundation
9:25 am – 10:10 am Concurrent Sessions
10:20 am – 11:05 am Concurrent Sessions
11:15 am – 12:00 pm Concurrent Sessions
12:10 pm – 1:45 pm Joint CES/AEA Luncheon
1:55 pm – 3:25 pm Concurrent Sessions
3:35 pm – 4:20 pm Concurrent Sessions
4:30 pm – 6:00 pm Concurrent Sessions
6:30 pm – 8:00 pm Reception and Silent Auction

Saturday, October 29, 2005

7:00 am – 5:00 pm Registration Desk Open
7:00 am – 12:00 pm Career Center Open
8:00 am – 5:00 pm Exhibits Open
8:00 am – 9:20 am Keynote Address: Lieutenant General Roméo Dallaire
9:35 am – 10:20 am Concurrent Sessions
10:30 am – 12:00 pm Concurrent Sessions
12:10 pm – 1:40 pm Concurrent Sessions
1:50 pm – 3:20 pm Concurrent Sessions
3:30 pm – 5:00 pm Concurrent Sessions

Sunday, October 30, 2005

8:00 am – 12:00 pm Registration Desk Open
9:00 am – 12:00 pm Professional Development Workshops





KEYNOTES



Sheila Fraser: Independence in the Context of Audit

In audit, as in evaluation, the need to remain impartial and independent in judgement-making

is of increasing importance as the political sensitivities of the programs in question amplify. Ms. Fraser will reflect on built-in safeguards to ensure independence in her role as Auditor General of Canada. She will describe how rigorous professional standards and fact validation processes insulate the Office of the Auditor General from political pressure.

Since being appointed Auditor General of Canada in May 2001, Ms. Fraser has focused the Office's efforts on serving the needs of parliamentarians and ensuring they have objective and reliable information with which to scrutinize government activities and hold the government to account for its stewardship of public funds. Before joining the Office, Ms. Fraser enjoyed a fruitful and challenging career with the firm of *Ernst & Young*, where she became a partner in 1981.

Ms. Fraser has always been active in her profession, at both the provincial and national levels. For her noteworthy service to the auditing and accounting professions, she was awarded the Prix Émélite 1993 and the designation "Fellow" by the *Ordre des comptables agréés du Québec* in 1994 and by the Institute of Chartered Accountants of Ontario in 2000. She received the Governor General's medal commemorating Canada's 125th anniversary in 1992. Ms. Fraser has also been awarded honorary Doctor of Laws degrees from Simon Fraser University and Queen's University that recognize her contribution to the fields of accounting and legislative auditing.

Ms. Fraser served as the Chair of the Public Sector Accounting Board of the Canadian Institute of Chartered Accountants in 2004-05. She currently chairs the Working Group on Environmental Auditing and the Subcommittee on Independence of Supreme Audit Institutions, two committees of the International Organization of Supreme Audit Institutions (INTOSAI).



Roberta Jamieson: Diplomacy, Democracy and Indigenous Peoples

Evaluation is considered by many as a powerful force that can aid people

and organizations in making progress toward achieving their own valued goals. Diversity, deliberation and democracy are increasingly familiar principles on the evaluation landscape. Ms. Jamieson will share her work in the interests of First Nations, Métis and Inuit peoples and indigenous peoples around the globe in promoting human rights, non-adversarial conflict resolution and democratic principles through leadership and institutional change.

Roberta Jamieson is CEO of the National Aboriginal Achievement Foundation and former Chief of the Six Nations of the Grand River Territory, the most populous First Nation in Canada. A ten year Ontario Ombudsman, Ms. Jamieson has won international acclaim for her passion, willingness to take risks, and high involvement in the field of dispute resolution.

The first Canadian Aboriginal woman to earn a law degree, Ms. Jamieson was also the first woman appointed Ontario's Ombudsman. Raised on the Six Nations of the Grand River, she learned to be an effective conciliator and negotiator within her large family – a skill that would define her career.

Lauded for developing and promoting non-adversarial methods of conflict resolution, Ms. Jamieson has collaborated with legal and political experts in Asia, Africa, Europe and North America to advance democracy through institutional change.



Lieutenant-General, Roméo Dallaire: Speaking Truth to Power

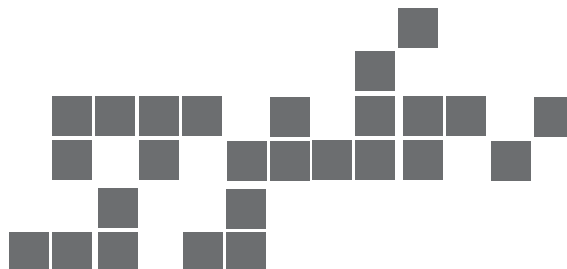
Speaking truth to power is a major professional responsibility of evalua-

tors. General Dallaire will share his experiences in trying to get the attention of the world, and then the resources and authority to act to prevent the genocide in Rwanda, over a decade ago. The General will use this tragic example of speaking truth to power to identify lessons learned, lessons that are likely to be of great value to those confronted by overwhelming resistance to facing the facts.

A decorated Lieutenant-General, Roméo Dallaire served for 35 years with the Canadian Armed Forces. A best-selling author, his recently released book, *Shake Hands with the Devil*, is a stirring account of his experience as the Force Commander of the United Nations Mission to Rwanda and exposes the failures by humanity to stop one of the worst genocides in the 20th century.

Lieutenant-General Dallaire received the Order of Canada in 2002. His book was awarded the Governor General's Literary Award for Non-Fiction in 2004. It has garnered numerous international literary awards, and will be the basis of a full-length feature film due for release in 2006. He was recently presented with the United Nations Association in Canada's Pearson Peace Medal by Canada's Governor-General, Adrienne Clarkson.

On March 24, 2005, Prime Minister Paul Martin announced that Her Excellency the Governor General has summoned Lieutenant-General Roméo Dallaire to the Senate. Lieutenant-General Dallaire will be sitting in the Senate as a member of the Liberal Party of Canada.





PROFESSIONAL DEVELOPMENT WORKSHOPS

Professional Development Workshops are hands-on, interactive sessions that provide an opportunity to learn new skills or hone existing ones. The workshops precede and follow the conference and differ from sessions offered during the conference in at least three ways:


1. Each is longer (either 3, 6, or 12 hours in length) and thus provides a more in-depth exploration of a skill or area of knowledge;
2. Presenters are paid for their time and are expected to have significant experience both presenting and in the subject area; and,
3. Attendees pay separately for these workshops and are given the opportunity to evaluate the experience.

Sessions are filled on a first-come, first-served basis and most are likely to fill before the conference begins.

Registration: Registration for professional development workshops is handled as part of the conference registration forms; however, you may register for professional development workshops even if you are not attending the conference itself. Fees: Workshop registration fees are in addition to the fees for conference registration. Please note that all fees are given in Canadian dollars.

	Two Day Workshop	One Day Workshop	Half Day Workshop
CES/AEA Members	\$420	\$210	\$105
Non Members	\$480	\$240	\$120
Students	\$220	\$110	\$55

Full Sessions: Sessions that are closed because they have reached their maximum attendance will be clearly marked below the session name online. No further registrations will be accepted for full sessions and we do not maintain waiting lists. Once sessions are closed, they will not be re-opened. Workshops will be delivered in the language of submission.



TWO DAY WORKSHOPS MONDAY-TUESDAY, OCT 24-25 9 am to 4 pm

Qualitative Methods

Qualitative data can humanize evaluations by portraying people and stories behind the numbers. Qualitative inquiry involves using in-depth interviews, focus groups, observational methods, and case studies to provide rich descriptions of processes, people, and programs. When combined with participatory and collaborative approaches, qualitative methods are especially appropriate for capacity-building-oriented evaluations.

Through lecture, discussion, and small-group practice, this workshop will help you to choose among qualitative methods and implement those methods in ways that are credible, useful, and rigorous. It will culminate with a discussion of new directions in qualitative evaluation.

You will learn:

- Types of evaluation questions for which qualitative inquiry is appropriate,
- Purposeful sampling strategies,
- Interviewing, case study, and observation methods,
- Analytical approaches that support useful evaluation.

*Michael Quinn Patton is an independent consultant and professor at the Union Institute. An internationally known expert on utilization-focused evaluation and qualitative methods, he published the third edition of **Qualitative Research and Evaluation Methods** (SAGE) in 2001.*

Session 1: Qualitative Methods
Scheduled: Monday and Tuesday, October 24 and 25,
9 am to 4 pm
Level: Beginner, no prerequisites

Quantitative Methods

Quantitative data offers opportunities for numerical descriptions of populations and samples. The challenge is in knowing which analyses are best for a given situation.

Designed for the practitioner needing a refresher course and/or guidance in applying quantitative methods to evaluation contexts, the workshop covers the basics of parametric statistics, and non-parametric statistics, as well as how to report your findings in ways useful to stakeholder groups.

Hands-on exercises interspersed with mini-lectures will introduce methods and concepts. The instructor will review examples of research and evaluation questions and the statistical methods appropriate to developing a quantitative data-based response.

You will learn:

- The conceptual basis for a variety of statistical procedures,
- How more sophisticated procedures are based on the statistical basics,
- Which analysis technique is best for a given data set or evaluation question,
- How to interpret and report findings from these analyses.

Katherine McKnight applies quantitative analysis in her practice as a research consultant and program evaluator for Public Interest Research Services. Additionally, she teaches Research Methods, Statistics, and Measurement in the Department of Psychology at the University of Arizona in Tucson, Arizona.

Session 2: Quantitative Methods
Scheduled: Monday and Tuesday, October 24 and 25,
9 am to 4 pm
Level: Beginner, no prerequisites

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CROSSING BORDERS, CROSSING BOUNDARIES

TWO DAY WORKSHOPS, continued
MONDAY-TUESDAY, OCT 24-25, 9 am to 4 pm

Consulting Skills for Evaluators: Getting Started

Do you have what it takes to be a successful independent consultant? Designed for evaluators considering becoming independent consultants or who have recently begun a consulting practice, the workshop will help you to assess your own skills and characteristics to determine if you have what it takes to be successful and strategize about areas in need of improvement.

The workshop will focus on the full scope of operating an independent consulting practice from marketing and proposal writing, to developing client relationships, to project management, ethics, and business operations. Case examples, hands-on activities, and take-home materials will prepare you to enter the world of consulting.

You will learn:

- If consulting is an appropriate career choice for you,
- How to break into the evaluation consulting market – and stay there,
- Time and money management strategies,
- Professional practices including customer service, ethical operations, and client relations.

Gail Barrington started Barrington Research Group 20 years ago as a sole practitioner. Today, she has a staff of 7 and a diverse client base. A top rated facilitator, she has taught workshops throughout the US and Canada.

Session 3: Consulting Skills
Scheduled: Monday and Tuesday, October 24 and 25,
9 am to 4 pm
Level: Beginner, no prerequisites

Evaluation 101: Intro to Evaluation Practice

Begin at the beginning and learn the basics of evaluation from an expert trainer. The session will focus on the logic of evaluation to answer the key question: "What resources are transformed into what program evaluation strategies to produce what outputs for which evaluation audiences, to serve what purposes." Enhance your skills in planning, conducting, monitoring, and modifying the evaluation so that it generates the information needed to improve program results and communicate program performance to key stakeholder groups.

A case-driven instructional process, using discussion, exercises, and lecture will introduce the steps in conducting useful evaluations: Getting started, Describing the program, Identifying evaluation questions, Collecting data, Analyzing and reporting, and Using results.

You will learn:

- The basic steps to an evaluation and important drivers of program assessment,
- Evaluation terminology,
- Contextual influences on evaluation and ways to respond,

- Logic modeling as a tool to describe a program and develop evaluation questions and foci,
- Methods for analyzing, and using evaluation information.

John McLaughlin has been part of the evaluation community for over 30 years working in the public, private, and non-profit sectors. He has presented this workshop in multiple venues and will tailor this two-day format for Evaluation 2005.

Session 4: Evaluation 101
Scheduled: Monday and Tuesday, October 24 and 25,
9 am to 4 pm
Level: Beginner, no prerequisites

Performance Planning, Measurement and Reporting for Continuous Improvement

Explore the latest in practical tools and techniques that have evolved to build capacity across diverse stakeholders to describe, analyze, plan, measure, report and manage performance. This workshop will focus on ideas and concepts from traditional evaluation practice, as well as new approaches from the fields of systems thinking, policy analysis, risk management and action research.

This workshop will showcase the most promising emerging cases, and will invite you to engage in hands-on small group work to further reinforce key concepts, practical applications to real situations, and group learning.

You will learn:

- How to establish multi-level results chains/performance frameworks,
- Uses of a Needs-Results hierarchy to set strategy,
- 'Umbrella' or high-level Results-based Management and Accountability Frameworks (RMAFs),
- Risk-results analyses,
- Approaches to Implementing evaluation strategies across diverse populations,
- Practical approaches to performance planning, measurement and reporting.

*Steve Montague, Partner at Performance Management Network Inc. and author of **The Three Rs of Performance**, will lead this workshop. He has two decades of international experience in performance measurement, program evaluation, review and audit projects as a management consultant and as an evaluation manager.*

Session 5: Performance Planning
Scheduled: Monday and Tuesday, October 24 and 25,
9 am to 4 pm
Level: Beginner, no prerequisites

Logic Models for Program Evaluation and Planning

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'll examine how to use logic models in evaluation to gain stakeholder consensus and determine evaluation focus, in program monitoring to determine a set of balanced performance measures, and in strategic planning to affirm mission and identify key strategic issues. Both days use modules with presentations, small group case studies, and debriefs to reinforce group work.

You will learn:

- To construct logic models,
- To develop an evaluation focus based on a logic model,
- To use logic models to answer strategic planning questions and select and develop performance measures.

Thomas Chapel is the central evaluation resource person and logic model trainer at the Centers for Disease Control. This is an expanded version of a workshop he has taught for the past 3 years to much acclaim.

Session 6: Logic Models
Scheduled: Monday and Tuesday, October 24 and 25,
9 am to 4 pm
Level: Beginner, no prerequisites

Participatory Evaluation

Participatory evaluation practice requires evaluators to be skilled facilitators of interpersonal interactions. This workshop will provide you with theoretical grounding (social interdependence theory, conflict theory, and evaluation use theory) and practical frameworks for analyzing and extending your own practice.

Through presentations, discussion, reflection, and case study, you will experience strategies to enhance participatory evaluation and foster interaction. You are encouraged to bring examples of challenges faced in your practice for discussion.


You will learn:

- Strategies to foster effective interaction, including belief sheets; values voting; three-step interview; cooperative rank order; graffiti; jigsaw; and data dialogue,

- Responses to challenges in participatory evaluation practices,
- Four frameworks for reflective evaluation practice.

Jean King has over 30 years of experience as an award-winning teacher at the University of Minnesota. As an evaluation practitioner, she has received AEA's Myrdal award for outstanding evaluation practice. Laurie Stevahn is a professor at Seattle University with extensive facilitation experience as well as applied experience in participatory evaluation.

Session 7: Participatory Eval
Prerequisites: Basic evaluation skills
Scheduled: Monday and Tuesday, October 24 and 25,
9 am to 4 pm
Level: Intermediate



FULL DAY WORKSHOPS TUESDAY, OCTOBER 25 9 am to 4 pm

Performance Measurement

Get up to speed on performance measurement and its contribution to program evaluation. A sound performance measurement system strengthens accountability, demonstrates value for money to taxpayers and funders, reinforces and supports planning and quality assurance processes, and, most importantly, improves performance at the strategic, client, and operational levels.

This intensive, interactive workshop uses many examples and case studies from a variety of government and non-profit agencies. Participants will engage a simple step-by-step process for developing meaningful performance measures. Focus will be on the use of performance measurement in reporting, management decision making and achieving program results.

You will learn:

- How to build a Simple Program Logic Model to identify a program's key results,
- How to develop performance measures for planning, monitoring and evaluating results,
- How to use performance measurement in a variety of practical management processes.

John Robert Allen a management consultant with more than 28 years of experience in performance measurement and program evaluation in the public sector. He is an experienced facilitator who has presented this workshop frequently in both the United States and Canada.

Session 8: Performance Measurement
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Beginner, no prerequisites

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FULL DAY WORKSHOPS continued
TUESDAY, OCTOBER 25, 9 am to 4 pm

Dealing with Reality: Systems Approaches to Evaluation

Systems theory is a large and highly evaluative field of inquiry. Evaluators can use many of the tools and techniques from the systems field, often with little modification. These tools can reveal otherwise hidden insights, help address ongoing evaluation challenges, and provide valuable short-cuts.

This workshop explores design, data collection, and analysis methods drawn from two systems theory based approaches – Soft Systems Methodology and Complex Adaptive Systems. Participants will learn and experiment with innovative techniques on a real case study and then determine the usefulness of these techniques to their own projects.

You will learn:

- Criteria for selecting systems based methods,
- Ways to integrate evaluation and systems-based methods to respond to the demands of a particular program,
- Multiple innovative and systems-based methods of evaluation design, data collection and analysis.

Bob Williams is an independent consultant and a pioneer in applying systems theory to the field of evaluation. Glenda Eoyang is founding Executive Director of the Human Systems Dynamics Institute and has presented systems approach workshops with Bob at previous AEA conferences.

Session 9: Systems Approaches
Prerequisites: Basics of needs assessment, eval methods and qualitative data collection and analysis
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Intermediate

RealWorld Evaluation: Overcoming Constraints

What do you do when asked to perform an evaluation on a program that is well underway? When time and resources are few, yet expectations high? When questions about baseline data and control groups are met with blank stares? This workshop presents a seven-step approach that seeks to ensure the best quality evaluation under real-life constraints.

Through presentations and discussion, with real-world examples drawn from international development evaluation, you will study the RealWorld Evaluation approach. The workshop focuses on developing country evaluation, but the techniques are applicable to evaluators working in any context with budget, time, and data constraints.

You will learn:

- The seven steps of the RealWorld Evaluation approach,
- Ways to reconstruct baseline data,
- How to identify, and overcome threats to the validity or adequacy of evaluation methods.

Jim Rugh will coordinate a team of four facilitators with extensive real-world experience in conducting evaluations in a range of

contexts worldwide. He is a leader in the area of conducting evaluations with budget, time, and data constraints.

Session 10: RealWorld Evaluation
Prerequisites: Academic or practical knowledge of the basics of evaluation
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Intermediate

Focus Group Interviewing

The focus group moderator plays a critical role in the quality of the focus group interview. This workshop will examine the function of the moderator and suggest methods that maximize his or her role. Specific topics will include when to use focus groups, developing powerful questions, solving problems regularly encountered by moderators, using effective and efficient analysis, and alternative moderating styles.

Through lecture, demonstration, discussion and practice, this hands-on session will introduce best practices in moderating, developing questions and analyzing results for focus groups. You will have the opportunity to participate in and/or observe a mock focus-group.

You will learn:

- Critical ingredients of focus group research,
- Focus group moderating skills,
- Development of focus group questions.
- Analysis strategies for group data.

*Richard Krueger is co-author of one of the most widely read texts on focus groups: **Focus Groups: A Practical Guide of Applied Research (SAGE)**, as well as numerous articles on the topic. He has conducted over 300 focus groups in the public, private, and non-profit sectors and is a highly experienced workshop facilitator who has offered sessions at AEA since 1988.*

Session 11: Focus Groups
Prerequisites: Experience with individual or group interviewing
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Intermediate

Coding? Qualitative Software? Why and How

Coding and qualitative software are viewed as resources that assist in the search for meaning in qualitative data. This session is designed to use practical experience with real data in the form of group exercise to direct discussion of important principles that shape qualitative analysis.

Individual and small group work are framed by seminars that explore pre-code work, code evolution, and memo writing. Qualitative software, including ATLAS.ti and MAXqda, is presented as a useful tool to integrate into analysis, but not as a solution to analysis challenges.

You will learn:

- The value of “context” in analytic decision-making,
- Processes that support the evolution of coding qualitative data,
- Strategies for moving through coding to later phases of finding meaning from narrative data,
- How and when to integrate software into the qualitative analysis process.

Ray Maietta is President and founder of ResearchTalk Inc, a qualitative inquiry consulting firm. He is an active qualitative researcher who also brings extensive experience as a trainer to the session. Jacob Blasczyk is an active, experienced evaluator with in-depth experience in using qualitative software.

Session 12: Coding
Prerequisites: Experience in qualitative data analysis
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Intermediate

Creative, Interactive Strategies for Communicating and Reporting

This unique session is designed to take practicing evaluators a level beyond their current communicating and reporting practices.

You will self-assess your practices to determine what formats and strategies you use most often, what challenges and successes you have experienced, and why. Then, select among learning opportunities in the newest areas of communicating and reporting: video and web conferencing, chat rooms and teleconferencing, working sessions, photography and cartoons, poetry and drama, video and computer-generated presentations, and website communications.

You will learn:

- To self-assess your communications needs,
- Cutting edge strategies in areas that you select as most applicable to your evaluation practice,
- In-depth about the one strategy that can benefit you right now.

*Rosalie Torres, of Torres Consulting Group, and Mary Piontek, from the University of Michigan, represent two-thirds of the authoring team for the 2nd edition of **Evaluation Strategies for Communicating and Reporting** (SAGE). They have applied their*

recommendations in a range of evaluation contexts, bringing practical experience to the workshop.

Session 13: Reporting
Prerequisites: Experience with evaluation communicating and reporting
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Intermediate

Structural Equation Modeling for Evaluators

Explore the conceptual, technical, and applied issues related to Structural Equation Modeling (SEM). SEM merges confirmatory factor analysis with path analysis and provides means for constructing, testing, and comparing comprehensive structural path models as well as comparing the goodness of fit of models and their adequacy across multiple samples.

Drawing heavily on structured lecture with opportunity for questions, this session will examine models varying from simple to more complex that cover a wide range of situations including longitudinal and mediational analyses, comparisons between groups, and analyses that include data from different sources such as from supervisors and co-workers.

You will learn:

- Features and advantages of SEM,
- When and how to apply 6 basic SEM models,
- To test specific hypotheses and compare models,
- To report SEM analysis.

Amiram Vinokur is a charter member of AEA currently at the University of Michigan's Institute for Social Research. He has written on SEM, uses it in his practice, and teaches it at the Survey Research Summer Institute.

Session 14: SEM for Evaluators
Prerequisites: Intermediate Statistics
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Intermediate

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CROSSING BORDERS, CROSSING BOUNDARIES

FULL DAY WORKSHOPS continued
TUESDAY, OCTOBER 25, 9 am to 4 pm

Evaluation Methodology Basics

Evaluation logic and methodology is a set of principles (logic) and procedures (methodology) that guide evaluators in combining descriptive data with relevant values to draw conclusions that address how good, valuable, or important something is, rather than just describing what it is like or what happened.

This workshop combines mini-lectures, demonstrations, small group exercises and interactive discussions to offer a “nuts and bolts” introduction to concrete, easy-to-follow, practical methods for conducting an evaluation.

You will learn:

- The difference between research methodology and evaluation-specific methodology,
- The fundamentals of theory-based needs assessment,
- Where the “values” come from in an evaluation,
- How to respond to questions about subjectivity,
- Which evaluative criteria are more important than others,
- The fundamentals of using rubrics to convert descriptive data to evaluative findings.

*Jane Davidson has nearly 20 years of experience teaching and conducting workshops on a wide variety of topics including evaluation and research methods. The methodologies presented in this workshop are drawn from her book **Evaluation Methodology Basics: The nuts and bolts of sound evaluation** (SAGE).*

Session 15: Eval Methodology
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Beginner, no prerequisites

Applying the Results Based Approach in Funding Applications and Ongoing Programs

Evaluation has become increasingly important as funding opportunities become more competitive. This workshop is geared, in particular, to those working with non-profit organizations that want to build evaluation into funding applications and programs.

Through hands-on exercises, presentations, and discussion, you will explore the Results Based Management approach to Program Logic Models and Evaluation Matrices. A Program Logic Model is a tool to help design and evaluate programs, demonstrating the relationship between program inputs, activities, outputs, outcomes and impacts. An Evaluation Matrix is a tool for systematically identifying evaluation questions, indicators of success, appropriate data sources and data collection methods.

You will learn:

- How to create Program Logic Models,
- How to develop an Evaluation Matrix,
- How to build evaluation into your funding applications and programs.

Harry Cummings, the award-winning director of Harry Cummings and Associates, has designed and led numerous training workshops in economic impact assessment. His associate, Hema Vyas, brings to the workshop a range of experience in applying the Results Based Approach in real-world situations.

Session 16: Results Based Approach
Scheduled: Tuesday, October 25, 9:00 am to 4:00 pm
Level: Beginner, no prerequisites

FULL DAY WORKSHOPS WEDNESDAY, OCTOBER 26 8 am to 3 pm

Using the Tools of Quality

In the early stages of development, Quality Assurance/Quality Control was defined as “...a type of evaluative monitoring.” Today, quality is more than just an action taken on an assembly line. It is a set of qualitative and quantitative tools applicable to all types of organizations including non-profits, government and education. In the course of its growth Quality has developed and adapted a number of tools and techniques that are relevant to all evaluators and should become a part of your tool kit.

This workshop uses mini-lectures, discussion and small group exercises to explore the Seven Tools of Quality Control and the Seven New Tools for Quality Management.

You will learn:

- The Seven Tools of Quality Control, including Pareto Charts, Scatter Diagrams, and Flowcharts,
- The Seven New Tools for Quality Management, including Affinity Diagrams and Prioritization Matrices,
- Applications of the tools to evaluation in a variety of contexts.

Thomas Berstene is the founder and president of WorkForce Planning Associates, Inc. He has more than twenty years of experience working in the area of quality and organizational assessments and facilitating professional development seminars.

Session 17: Tools of Quality
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Evaluation and Policy Implementation

Policy implementation can be thought of as a multi-level, multi-site intervention in an organizational system. This workshop explores evaluation as it relates to two important implementation strategies. The *fidelity approach* focuses on development of a large scale program that is delivered at all sites and the *adaptation approach* focuses on development of programs that respond to the needs of groups within the larger system.

Using mini-lectures, small group exercises and discussion, this session enables participants to learn about evaluative methods appropriate to both of these approaches. We will also address the information needs of policy makers, program managers, the legislature and other stakeholders.

You will learn:

- How to structure evaluations to influence the quality of policy implementation,
- How to identify and respond to the diverse needs of policy stakeholders,
- How to determine policy impact.

John Owen founded the graduate teaching program at the Centre for Program Evaluation at Melbourne University. He is a Fellow of the Australasian Evaluation Society and has offered workshops for the AES and AEA. Pam St Leger brings to the workshop a wealth of facilitation skills and is a Senior Lecturer at the Centre for Program Evaluation.

Session 18: Policy Implementation
Prerequisites: Experience with policy development and evaluation
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

Success Case Method Evaluation

The Success Case Method (SCM) is a proven and effective method to quickly evaluate the impact of training programs and other organizational or performance improvement initiatives. It is research-based, practical, efficient and produces highly credible and trustworthy impact. The SCM intentionally seeks the very best results a program is producing so that best practices can be leveraged and extended.

Workshop participants will practice with and learn about the SCM through presentations, simulation exercises, and review of case examples. Extensive take home resources, examples, and job aids facilitate on-the-job application of workshop content.

You will learn:

- Fundamental principles and concepts of Success Case Evaluation Method (SCM),
- How to plan and conduct a complete SCM evaluation,
- Strategic applications of the SCM.

Robert Brinkerhoff developed the SCM throughout the past 20 years in which he evaluated the impact and effectiveness of training interventions in organizations worldwide and is the author of

12 books on the topic including, The Success Case Method: Find Out Quickly What's Working and What's Not (Berrett Koehler). He will lead a team of three during this workshop.

Session 19: Success Case Method Evaluation
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Using Rasch to Measure Services and Outcomes

Program evaluation has great need for the development of valid measures, e.g. of the quantity and quality of services and of the outcomes of those services. Many evaluators are frustrated when existing instruments are not well tailored to the task and do not produce the needed sensitive, accurate, valid findings.

Through an extensive presentation, followed by discussion and hands-on work with data sets and computer-generated output, this workshop will explore Rasch Measurement as a means to effectively measure program services. Attendees should bring their own charged PC laptop and will receive a copy of the Winsteps software at the workshop.

You will learn:

- Differences between Classical Test Theory and Rasch Measurement,
- Why, when, and how to apply Rasch measurement,
- Hands-on application of Rasch analysis using Winsteps software,
- Interpretation of Rasch/Winsteps output.

Kendon Conrad is from the University of Illinois at Chicago and Nikolaus Bezrucko is an independent consultant. They bring extensive experience in both teaching about, and applying, Rasch measurement to evaluation.

Session 20: Rasch Measurement
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

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CROSSING BORDERS, CROSSING BOUNDARIES

FULL DAY WORKSHOPS continued
WEDNESDAY, OCTOBER 26, 8 am to 3 pm

Using Appreciative Inquiry In Evaluation

Experience the power of appreciative reframing! An appreciative approach to evaluation maximizes chances for sustainable impact by helping programs identify what is working and drawing on existing strengths to build capacity and improve program effectiveness. Appreciatively oriented evaluation does not veil problems, but rather refocuses energy in a constructive and empowering way.

You will experience the various phases of Appreciative Inquiry (AI) using appreciative interviews to focus on evaluation, developing indicators and data collection tools, conducting appreciative interviews, analyzing interview data, and sharing results. The workshop uses real-world case examples, exercises, discussion and short lectures to show participants how to incorporate AI into their evaluation contexts.

You will learn:

- The principles and applications of appreciative inquiry,
- How to formulate evaluation goals and questions using the appreciative inquiry approach,
- How to develop interview guides, conduct interviews and analyze interview data,
- How to reframe deficits into assets.

Tessie Catsambas, President of EnCompass LLC, and Hallie Preskill, University of New Mexico professor and evaluation consultant, together bring to the workshop years of training experience and hands-on practice using AI in a variety of program contexts.

Session 21: Appreciative Inquiry
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Needs Assessment

Assessing needs is a task often assigned to evaluators with the assumption that they have been trained in or have experience with the activity. However, surveys of evaluation training indicated that by the year 2002 only one formal course on the topic was being taught in university based evaluation programs.

This workshop uses hands-on activities interspersed with mini-presentations and discussions to provide an overview of needs assessment. The focus will be on basic terms and concepts, models of needs assessment, steps necessary to conduct a needs assessment and an overview of methods.

You will learn:

- The definition of need and need assessment and levels, types and examples of needs,
- Models of needs assessment with emphasis on a comprehensive 3-phase model,

- How to manage a comprehensive needs,
- Methods commonly used in needs assessment.

James Altschuld is a professor at Ohio State University and the instructor of the only needs assessment course in the most recent study of evaluation training. He has co-written two books on needs assessment and is a well-known presenter of workshops on the topic in numerous respected venues.

Session 22: Needs Assessment
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Utilization-focused Evaluation

Evaluations should be useful, practical, accurate and ethical. Utilization-focused Evaluation is a process that meets these expectations and promotes use of evaluation from beginning to end. By carefully implementing evaluations for increased utility, this approach encourages situational responsiveness, adaptability and creativity.

With an overall goal of teaching you the process of Utilization-focused Evaluation, the session will combine lectures with concrete examples and interactive case analyses, including cases provided by the participants.

You will learn:

- The fundamental premises of Utilization-focused Evaluation,
- The implications of focusing an evaluation on intended use by intended users,
- Options for evaluation design and methods based on situational responsiveness, adaptability and creativity,
- How to use the Utilization-focused Evaluation checklist & flowchart.

*Michael Quinn Patton is an independent consultant and professor at the Union Institute. An internationally known expert on Utilization-focused Evaluation, in 1997 he published the third edition of the book on which this session is based, **Utilization Focused Evaluation: The New Century Text (SAGE)**.*

Session 23: Utilization-focused
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Theory-Driven Evaluation

Learn the theory-driven approach for assessing and improving program planning, implementation and effectiveness. Participants will explore the conceptual framework of program theory and its structure, which facilitates precise communication between evaluators and stakeholders regarding evaluation needs and approaches to address those needs.

Mini-lectures, group exercises and case studies will illustrate the use of program theory and theory-driven evaluation for program planning, initial implementation, mature implementation and outcomes. In the outcome stages, you will explore the differences among outcome monitoring, efficacy evaluation and effectiveness evaluation.

You will learn:

- How to apply the conceptual framework of program theory,
- How to apply the theory-driven approach to select an evaluation that is best suited to particular needs,
- How to apply the theory-driven approach for evaluating a program's particular stage or the full cycle.

*Huey Chen, professor at the University of Alabama at Birmingham, is the author of **Theory-Driven Evaluations** (SAGE), the classic text for understanding program theory and theory-driven evaluation. He is an internationally known workshop facilitator on the subject.*

Session 24: Theory Driven Evaluation
Prerequisites: Knowledge of logic models or program theory
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

Presenting Evaluation Findings: Effective Messaging for Evaluators

Explore the difference between “presenting” findings and “communicating” findings. This is an interactive session for any evaluator who is asked to present evaluation findings in front of an audience. Participants are introduced to three primary channels of communication: how you look, how you sound and how you organize what you say.

The instructor will model a behavior, explain an idea and demonstrate concept after which attendees will have the opportunity to practice in front of the group and receive coaching and feedback. Come prepared with a specific topic that you'll be asked to present in the near future.

You will learn:

- The importance of the three main channels of communication,
- How to eliminate distracting physical behaviors from your presentations,
- How to organize and effectively stage an evaluation presentation for maximum impact.

Carl Hansen hails from The Evaluation Center at Western Michigan University and is a certified interpersonal skills instructor. An experienced facilitator and presentations coach, he excels at developing, practicing and teaching presentation skills.

Session 25: Presenting Evaluation Findings
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

360-Degree Feedback: Online Methods and Techniques

360-degree feedback is a powerful multi-dimensional leadership development tool. Feedback is obtained from a range of perspectives across an organization. The ease of deploying surveys on the web does not mean that organizations are better equipped to implement 360-degree, but it does produce new opportunities and challenges.

Through mini-lecture, demonstration, discussion, small group practice and role-play this workshop will introduce you to conducting effective 360-degree feedback online.

You will learn:

- The steps in the 360-degree feedback process,
- The evaluation framework to understand outcomes for different stakeholders,
- How to implement 360-degree instruments,
- How to interpret reports and selection of strategies for effective feedback.

Zita Unger hails from Evaluation Solutions, a consulting company with extensive experience in the design and delivery of online evaluation instruments and has received the Australasian Evaluation Society's Evaluation Training and Service award for outstanding contributions to the profession of evaluation.

Session 26: 360-Degree Feedback
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Using Effect Size and Association Measures

Answer the call to report effect size and association measures as part of your evaluation results. Improve your capacity to understand and apply a range of measures including: standardized measures of effect sizes from Cohen, Glass, and Hedges; Eta-squared; Omega-squared; the Intraclass correlation coefficient; and Cramer's V.

Through mini-lecture, hands-on exercises, and demonstration, you will improve your understanding of the theoretical foundation and computational procedures for each measure as well as ways to identify and correct for bias.

You will learn:

- How to select and compute the appropriate measure of effect size or association.
- Considerations in the use of confidence intervals,
- Ways to identify and correct for measurement bias.

Jack Barnette from The University of Alabama at Birmingham and James McLean from The University of Alabama-Tuscaloosa have been conducting research and writing on this topic for over five years. Together, they bring over 60 years of teaching and workshop facilitation experience and both have received awards for outstanding teaching.

Session 27: Effect Size, Measures
Prerequisites: Univariate statistics through ANOVA & power
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

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CROSSING BORDERS, CROSSING BOUNDARIES

FULL DAY WORKSHOPS continued
WEDNESDAY, OCTOBER 26, 8 am to 3 pm

Minding Your Mind: Using Your Brain More Effectively

Evaluators seldom pay attention to how their brains work day to day; how they are affected by food; how memories are created, organized, and accessed; under what physical circumstances inspiration arises; how ideas are generated and connected to one another; how sleep, exercise, unstructured time, and life problems affect what they think about; and how easily or stressfully they handle day to day thinking chores.

Through lecture and discussion, this workshop addresses how thinking can be made easier, less stressful, and more productive. This is not about “gimmicks” or clever philosophical insights, but is based on the working habits of successful people involved in intellectual work.

You will learn:

- How to work effectively on many evaluation topics at one time,
- How to increase the odds of finding solutions to hard problems,
- What to eat to increase your mental energy,
- How to connect with thoughtful people for mutual benefit.

George Grob works with the Office of Inspector General Corps and has managed over 1000 evaluations and 100 evaluators in the past 15 years. Increasingly, his teaching focuses on effective performance, problem solving, and thinking for evaluators.

Session 28: Minding Your Mind
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Improved Instrument Development Through Group Facilitation

Sound instrument design is the hallmark of quality evaluation practice. A solid understanding of item writing techniques and the ability to effectively implement them are critical. Most item writing, however, takes place in isolation or with uneven contributions from all participants. The item writing process can be greatly enhanced through the use of group techniques.

This workshop outlines the process of item writing, showcasing the role of nominal group technique as a process for item writers to voice their opinions, prioritize their thoughts, and create coherent plans.

You will learn:

- A research-based system for generating survey items,
- When and how to use nominal group technique and its benefits,
- Technical aspects of item writing,
- A strategy for pilot testing newly developed items,
- Pitfalls to avoid in item writing.

Jennifer Dewey is an expert facilitator with varied experience in the areas of quality assurance and evaluation, most currently working for ORC Marco as an internal trainer. Stacie Hudgens hails from Learning Point Associates where she designs and implements evaluation projects for external contracts.

Session 29: Instrument Development
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites

Multilevel Models in Program Evaluation

Multilevel models (also called hierarchical linear models) open the door to understanding the inter-relationships among nested structures (students in classrooms in schools in districts for instance), or the ways evaluands change across time (perhaps longitudinal examinations of health interventions). This workshop will demystify multilevel models and present them at an accessible level, stressing their practical applications in evaluation.

Through discussion and hands-on demonstrations, the workshop will address four key questions: When are multilevel models necessary? How can they be implemented using standard software? How does one interpret multilevel results? What are recent developments in this arena?

You will learn:

- The basics of multilevel modeling,
- When to use multilevel models in your evaluation practice,
- How to implement models using widely available software.

Sanjeev Sridharan is head of evaluation programs and a senior research fellow at the University of Edinburgh as well as a trainer for SPSS and an Associate Editor for the American Journal of Evaluation.

Session 30: Multilevel Models
Prerequisites: Basic understanding of Regression Methodology
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

Getting the Values Into Evaluation

Evaluative conclusions are about the merit or worth or the evaluand, and therefore require a combination of empirical data about its performance and some standards of merit or value. The usual training of evaluators prepares them to find out what a program is and does, but they are not familiar with ways to identify and validate the program's value.

This workshop will use a set of handouts and posters plus a series of case studies to make the process clear and accessible. Basic concepts include dimensions of merit, plus weights, bars, stars, steps, and standards as indicators of value strength.

You will learn:

- How to identify all relevant values,
- How to validate (or invalidate) these values,
- How to combine the values with empirical results to get an evaluative conclusion.

Michael Scriven is among the most well-known professionals in the field today with 25 years of work on the philosophy of science. He has over 90 publications in the field of evaluation, many tangentially or directly relevant to this theme.

Session 31: Values in Evaluation
Prerequisites: Skills in determining empirical facts
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

Evaluation Practice: A Collaborative Approach

Collaborative evaluation is an approach that actively engages program stakeholders in the evaluation process. When stakeholders collaborate with evaluators, stakeholder and evaluator understanding increases and the utility of the evaluation is often enhanced.

Employing discussion, hands-on activities, and roleplaying, this workshop focuses on strategies and techniques for conducting successful collaborative evaluations, including ways to avoid common collaborative evaluation pitfalls.

You will learn:

- A collaborative approach to evaluation,
- Levels of collaborative evaluation and when and how to employ them,
- Techniques used in collaborative evaluation,
- Collaborative evaluation design and data-collection strategies.

Rita O'Sullivan of the University of North Carolina and John O'Sullivan of North Carolina A&T State University have offered this well-received session for the past seven years at AEA. The presenters have used collaborative evaluation techniques in a variety of program settings, including education, extension, family support, health, and non-profit organizations.

Session 32: Collaborative Eval
Prerequisites: Basic Eval Skills
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

Evaluation in Immigrant Communities

Attend to the unique issues of working in communities and cultures with which you may be unfamiliar and within which your craft is unknown. This workshop will examine such issues as access, entry, relationship-building, sampling, culturally specific outcomes, instrument development, translation, culturally appropriate behavior and stakeholder participation.

Drawing on case examples from practice in immigrant communities, we will illustrate what has and hasn't worked, principles of good practice, and the learning opportunities for all involved. Through simulations and exercises you will experience the challenges and rewards of cross-cultural evaluation.

You will learn:

- Approaches to evaluation practice in unfamiliar cultures and settings,
- How to draw upon the traditions of communities in mutually beneficial ways,
- Useful, respectful and credible ways to collect and report information for stakeholders.

Barry Cohen and Mia Robillos are on the staff of Rainbow Research, Inc. They bring experience working with Hmong, Latino, Somali, Nigerian, Native American, and Filipino cultures in their evaluation practice.

Session 33: Immigrant Communities
Prerequisites: Work with immigrant communities
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

Cost-Benefit and Cost-Effectiveness Methods

Get an overview of the main theoretical and applied issues in using cost-effectiveness (CEA) and cost-benefit (CBA) techniques. An important element of this workshop is to show that CEA is a retrospective technique well suited to program evaluation, while CBA is a prospective technique best suited for program planning.

Participants will study cost-effectiveness measures applied to health (vaccination) and labor market training and cost-benefit analysis applied to transportation and infrastructure planning through a combination of lectures and group discussion.

You will learn:

- The theoretical foundations of cost benefit analysis and cost effectiveness analysis,
- The difference between CBA and CEA, and why CEA is preferred in most settings,
- The data requirements for successful application of CBA and CEA,
- How to allocate costs to program activities,
- How to apply CEA in a range of contexts.

Greg Mason hails from the University of Manitoba where he has been a member of the Department of Economics since 1974. He has more than 20 years experience in making professional presentations in the area of cost-effectiveness analysis.

Session 34: Cost-Effectiveness
Prerequisites: Evaluation theory or experience
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Intermediate

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FULL DAY WORKSHOPS continued
WEDNESDAY, OCTOBER 26, 8 am to 3 pm

Experimental Designs in Evaluation

Experimental designs are central to much of the work done in evaluation and yet also a source of controversy. To understand the controversy and make the best use of these designs when appropriate, evaluators need to be versed in the logic, concepts, and practical lessons involved in crafting and implementing experimental designs in evaluation.


With an emphasis on hands-on exercises and checklists to guide your later work, this workshop introduces you to effective use of experimental designs in supporting strong causal conclusions about program and policy impacts.

You will learn:

- The conceptual advantages and drawbacks of experimental designs,
- When and in what contexts to use experimental designs,
- How to modify experimental designs to address the constraints and information needs of specific contexts, including the use of recently developed designs,
- How to anticipate and plan for problems in implementing experimental design evaluations.

Fred Newman is a Professor at Florida International University with over thirty years of experience in performing front line program evaluation studies. George Julnes, Associate Professor of Psychology at Utah State University, has been contributing to evaluation theory for over 15 years and has been working with the Social Security Administration and the U.S. Dept. of Education on the design and implementation of randomized field trials.

Session 35: Experimental Design
Scheduled: Wednesday, October 26, 8:00 am to 3:00 pm
Level: Beginner, no prerequisites



HALF DAY WORKSHOPS

WEDNESDAY, OCTOBER 26
8 am to 11 am

Community and Systems Change Efforts: Evaluation Dilemmas and Methods

Critical issues have emerged as programs address community and systems change that are not addressed by methods used to evaluate individual outcomes. This workshop reviews and actively engages participants in exploring evaluation dilemmas. Methods and approaches will be reviewed including participatory development of program theory, semi-structured interviewing, tools to measure collaboration and relational mapping.

Participants will engage in a relational mapping exercise using a case study to explore relationships among program characteristics that influence program development and contribute to community-based change efforts.

You will learn:

- How to identify and adapt approaches to evaluating community and systems changes,
- How to develop approaches to engage multiple and diverse stakeholders,
- How to apply relational mapping to establish relationships among multiple factors.

Susanna Ginsburg has more than 30 years of experience in designing evaluations at the community and funder levels and conducting hands-on workshops on the topic. She will lead a team of three facilitators experienced in community and systems development evaluation.

Session 36: Community Change
Prerequisites: Experience evaluating community-based programs, application of logic models and theory of change to evaluation design
Scheduled: Wednesday, October 26, 8:00 am to 11:00 am
Level: Intermediate

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. The basic steps of empowerment evaluation include: 1) establishing a mission or unifying purpose for a group or program; 2) taking stock – creating a baseline to measure future growth and improvement; and 3) planning for the future – establishing goals and strategies to achieve goals, as well as credible evidence to monitor change. The role of the evaluator is that of coach or facilitator in an empowerment evaluation, since the group is in charge of the evaluation itself.

Employing lecture, activities, demonstration and discussion, the workshop will introduce you to the steps of empowerment evaluation and tools to facilitate the approach.

You will learn:

- Steps to empowerment evaluation,
- How to facilitate the prioritization of program activities,
- Ways to guide a program's self-assessment.

*David Fetterman hails from Stanford University and is the editor of (and a contributor to) the recently published **Empowerment Evaluation Principles in Practice** (Guilford). He Chairs the Collaborative, Participatory and Empowerment Evaluation AEA Topical Interest Group and is a highly experienced and sought after facilitator.*

Session 37: Empowerment Evaluation
Scheduled: Wednesday, October 26, 8:00 am to 11:00 am
Level: Beginner, no prerequisites

Building a Performance Management System for Program Improvement

Performance management is a process for getting and focusing attention on the most important aspects of your program and using that focus to improve services. Two critical steps to the development of such a system are measuring only the few, most important, aspects and using the data.

Through lecture, discussion, exercise, and the use of a range of examples, this session provides an overview of performance management for beginners. Participants will review the basic steps to implementing a new performance management system and have the opportunity to draft and receive feedback on basic performance management plans.

You will learn:

- The definition and purpose of performance management and its relationship to program evaluation,
- Basic implementation issues and common pitfalls,
- How to apply this knowledge by drafting steps to developing your own system.

Natalia Pane of the American Institute for Research, has given workshops and sessions with thousands of professionals and grantees on performance management, strategic planning and data quality. She has published and presented over 40 pieces on performance management and related data quality and strategic planning issues.

Session 38: Performance Management
Scheduled: Wednesday, October 26, 8:00 am to 11:00 am
Level: Beginner, no prerequisites

Putting Fun and Evaluation in the Same Sentence

Engaging stakeholders' interest and increasing their ownership of the evaluation process usually elicits groans rather than jumps of joy. One reason for this is a general lack of enjoyment and imagination.

Through interactive discussions and demonstrations, an evaluation board game (complete with chocolate!) improv comedy, and facials, learn how to creatively gather data, elicit education stories and have stakeholders actually ask to do more evaluation while satisfying funder requirements. Participants will also receive a follow-up resource package to use after the workshop.

You will learn:

- How to increase stakeholder ownership through creative evaluation techniques,
- How to link creative evaluation techniques with evaluation methodology,
- How to include diverse stakeholders in the evaluation process.

Lee-Anne Ragan has received much acclaim for her work as a specialist in evaluation, cross-cultural training and conflict resolution and has been providing lively, engaging workshops for more than 16 years. She is the co-owner of Rock.Paper.Scissors, a corporate training and entertainment company.

Session 40: Fun and Evaluation
Prerequisites: Knowledge of the program logic model
Scheduled: Wednesday, October 26, 8:00 am to 11:00 am
Level: Intermediate

Using Stories in Evaluation

Stories are an effective means of communicating the ways in which individuals are influenced by educational, health, and human service agencies and programs. Unfortunately, the story has been undervalued and largely ignored as a research and reporting procedure. Stories are sometimes regarded with suspicion because of the haphazard manner in which they are captured or the cavalier promise of what the story depicts.

Using Stories in Evaluation continued

Through short lecture, discussion, demonstration, and hands-on activities, this workshop explores effective strategies for discovering, collecting, analyzing and reporting stories that illustrate program processes, benefits, strengths or weaknesses.

You will learn:

- How stories can reflect disciplined inquiry,
- How to capture, save, and analyze stories in evaluation contexts,
- How stories for evaluation purposes are often different from other types of stories.

Richard Krueger is on the faculty at the University of Minnesota and has over 20 years experience in capturing stories in evaluation. He has offered well-received professional development workshops at AEA and for non-profit and government audiences for over 15 years.

Session 39: Using Stories
Scheduled: Wednesday, October 26, 8:00 am to 11:00 am
Level: Beginner, no prerequisites



HALF DAY WORKSHOPS
WEDNESDAY, OCTOBER 26
12 pm to 3 pm

Evaluating Programs for Children

Evaluation programs for children calls for skills and knowledge that go beyond traditional evaluation. Increasing emphasis on student outcomes, teacher outcomes, and site visits creates a need for evaluators to further develop their specialized knowledge and skills appropriate to contexts with children.

You will gain an increased awareness of principals and concepts through mini-lectures on observation, instruments and strategies, and engage in brief application exercises and group discussion.

You will learn:

- The “why” and “how” of conducting effective evaluation of programs for children,
- Practical strategies and tools for evaluating children’s programs,
- Why some strategies work and why some do not work,
- A range of currently available instruments and their use.

Shannan McNair is an associate professor of Early Childhood Education, who has been involved in developing and presenting workshops for over 20 years. She conducts evaluations on a regular basis for programs serving children from preschool through high school. She will lead a team of three presenters from Oakland University.

Session 41: Programs for Children
Prerequisites: Basics of Evaluation, Applied experience
Scheduled: Wednesday, October 26, 12:00 pm to 3:00 pm
Level: Intermediate

TRIAGE : Du nouveau dans le monde des techniques de groupe en évaluation

Aux techniques de groupe traditionnellement utilisées en évaluation, s’est récemment ajoutée la TRIAGE (Technique de Recherche d’Information par Animation d’un Groupe Expert). Mais qu’est-ce au juste que TRIAGE? D’où vient cette technique? Comment procède-t-elle? Quand l’utiliser? Quelles sont ses forces et faiblesses? Quelles habiletés exige-t-elle de la part de l’évaluateur?

Nous vous convions donc à une exploration intensive de TRIAGE. Exposé théorique, démonstration, discussions à partir d’histoires de cas et expérimentation seront utilisés dans cet atelier. Vous pourrez ainsi rapidement vous approprier cette technique de façon à pouvoir l’appliquer avec efficacité dans votre milieu de pratique.

Vous apprendrez:

- à reconnaître les composantes de TRIAGE et son contexte d’utilisation en évaluation
- à distinguer les différentes techniques de groupe (technique Delphi, technique du groupe nominal, focus group) et à reconnaître l’apport complémentaire de TRIAGE,

- à dégager la contribution distinctive de TRIAGE dans divers projets d’évaluation,
- à utiliser TRIAGE à partir d’un cas d’évaluation.

Marie Gervais oeuvre dans le domaine de l’évaluation depuis près de 15 ans. Elle enseigne et dirige des projets d’envergure en santé et dans divers réseaux de services au Québec. Geneviève Pépin est également active en évaluation dans le domaine de la santé.

Session 42: TRIAGE
Scheduled: Wednesday, October 26, 12:00 pm to 3:00 pm
Level: Beginner, no prerequisites
Note: This session will be offered in French

Survey Design and Administration

This professional development workshop is designed for beginners in the field of evaluation. You will be introduced to the fundamentals of survey design and administration.

This interactive workshop will use a combination of direct instruction with hands-on opportunities for participants to apply what is learned to their own evaluation projects. Learn about different types of surveys, how to choose the right one, how to administer the survey and how to increase response rates and quality of data. Attendees will receive handouts with sample surveys, item writing tips, checklists, and resource lists for further information.

You will learn:

- The various types and formats of surveys,
- Procedures for high quality survey design,
- How to write high quality items,
- Strategies for increasing reliability and validity.

Courtney Malloy and Harold Urman are consultants at Vital Research, a research and evaluation firm that specializes in survey design. They both have extensive experience facilitating workshops and training sessions on research and evaluation for diverse audiences.

Session 43: Survey Design
Scheduled: Wednesday, October 26, 12:00 pm to 3:00 pm
Level: Beginner, no prerequisites

The Swinging Dance of Evaluation: Lessons in Collaboration and Partnership

Care to dance? This lively and highly interactive workshop explores concepts related to swing dance to build our collaborative and partnering skills as professional evaluators. Rhythmic and dance-related activities will highlight fundamental issues in our work as evaluators from enhancing our perspective to examining our process to informing our practice.

Participants will listen and move to music to illustrate the evaluation process and reflect on how experiences in the workshop can shape the way you approach your evaluation practice.

You will learn:

- Ways of collaborating and partnering with clients using the metaphor of dance,
- Skills of leading and following in an evaluation setting,
- How concepts and experiences in the workshop can shape your approach to evaluation.

Phyllis Clay is the co-founder and owner of Youth Policy Research Group, Inc. Jamie Callahan teaches in the Human Resources Development Program at Texas A&M University. They are both competitive dancers who apply the creative metaphor of dance in their evaluation professions. A shortened version of this workshop at the 2004 AEA Conference was extremely well received.

Session 44: Swinging Dance
Scheduled: Wednesday, October 26, 12:00 pm to 3:00 pm
Level: Beginner, no prerequisites – two left feet welcomed!

Cultivating Self as Responsive Instrument

Evaluative judgments are inextricably bound up with culture and context. The AEA Guiding Principles encourage greater realization that excellence and ethical practice in evaluation are intertwined with orientations toward, responsiveness to, and capacities for engaging diversity. Breathing life into this expectation calls for critical ongoing personal homework for evaluators regarding their lenses and filters vis- a-vis their judgment-making.

We will explore individual and group reflective exercises that spotlight culture and context issues and help us develop and refine the self as a diversity-grounded responsive instrument. This workshop addresses the reality that, from our privileged standpoints, we often look but still do not see, listen but do not hear, touch but do not feel. Such limitations handicap our capacities to accurately discern, describe, engage, interpret, and evaluate truths from multiple vantage points.

You will learn:

- To attend to your self as instrument and, thus, enhance “interpersonal validity” (The soundness and trustworthiness of self as knower, inquirer and engager of others),
- To identify the lenses and filters influencing your meaning-making and evaluation practice,

- To examine how stakeholders’ perceptions of the evaluator impact evaluation accuracy and effectiveness.

Hazel Symonette brings over 30 years of work in diversity-related arenas to the workshop. She is founder and Director of the University of Wisconsin-Madison Excellence Through Diversity Institute: A year-long train-the-trainers/facilitators initiative organized around responsive assessment and evaluation.

Session 45: Cultivating Self
Scheduled: Wednesday, October 26, 12:00 pm to 3:00 pm
Level: Beginner, no prerequisites

HALF DAY WORKSHOPS SUNDAY, OCTOBER 30 9 am to 12 pm

Advanced Applications of Program Theory

While simple logic models are an adequate way to gain clarity and initial understanding about a program, sound program theory can enhance understanding of the underlying logic of the program by providing a disciplined way to state and test assumptions about how program activities are expected to lead to program outcomes.

Lecture, exercises, discussion, and peer-critique will help you to develop and use program theory as a basis for decisions about measurement and evaluation methods, to disentangle the success or failure of a program from the validity of its conceptual model, and to facilitate the participation and engagement of diverse stakeholder groups.

You will learn:

- To employ program theory to understand the logic of a program,
- How program theory can improve evaluation accuracy and use,
- To use program theory as part of participatory evaluation practice.

Stewart Donaldson is Dean of the School of Behavioral and Organizational Sciences at Claremont Graduate University. He has published widely on the topic of applying program theory, developed one of the largest university-based evaluation training programs, and has conducted theory-driven evaluations for more than 100 organizations during the past decade.

Session 46: Program Theory
Prerequisites: Experience or Training in Logic Models
Scheduled: Sunday, October 30, 9:00 am to 12:00 pm
Level: Intermediate

2005 JOINT CES/AEA CONFERENCE

CROSSING BORDERS, CROSSING BOUNDARIES

HALF DAY WORKSHOPS continued
SUNDAY, OCTOBER 26, 9 am to 12 pm

Collaborative Evaluations: A Step-by Step Model

Collaborative evaluation is an approach that actively engages program stakeholders in the evaluation process. This workshop uses clear, simple language to outline key concepts and effective tools to help master the mechanics of collaboration.

Using discussion, demonstration and hands-on exercises the workshop will blend theoretical grounding with the application of the Model of Collaborative Evaluations to real-life evaluations with special emphasis on the factors that facilitate and inhibit stakeholders' participation. You are encouraged to bring actual evaluation examples and specific problem areas for discussion.

You will learn:

- The factors that influence the success of collaboration in evaluations,
- Practical guidelines that bridge the gap between theory and practice,
- How to capitalize on other's strengths to encourage feedback and deal with misunderstandings,
- Processes for selecting appropriate collaboration methods.

Liliana Rodriguez-Campos of Western Michigan University brings to this workshop extensive experience in conducting collaborative evaluations across a variety of settings and countries. She has designed and delivered numerous professional development workshops in this area of expertise.

Session 47: Collaborative Evaluations
Scheduled: Sunday, October 30, 9:00 am to 12:00 pm
Level: Beginner, no prerequisites

Focus Group Moderator Training

The literature is rich in textbooks and case studies on many aspects of focus groups including design, implementation and analyses. Missing however are guidelines and discussions on how to moderate a focus group.

In this experiential learning environment, you will find out how to maximize time, build rapport, create energy and apply communication tools in a focus group to maintain the flow of discussion among the participants and elicit more than one-person answers. You will learn at least 15 strategies to create and maintain a focus group discussion. These strategies can also be applied in other evaluation settings such as community forums and committee meetings to stimulate discussion.

You will learn:

- How to moderate a focus group,
- At least 15 strategies to create and maintain focus group discussion,
- How to stimulate discussion in community forums, committee meetings, and social settings.

Nancy-Ellen Kiernan has facilitated over 150 workshops on evaluation methodology and moderated focus groups in 50+

studies with groups ranging from Amish dairy farmers in barns to at-risk teens in youth centers, to university faculty in classrooms.

Session 48: Moderator Training
Prerequisites: Having moderated a focus group
Scheduled: Sunday, October 30, 9:00 am to 12:00 pm
Level: Intermediate

Analyzing Text and Audio Data

Are you drowning in a sea of words? Take this opportunity to focus on the practical use of qualitative data analysis (QDA) for dealing with text and audio data such as that derived from focus groups and interviews.

Though hands-on work with sample data, you will select and mark quotations, generate meaningful and useful codes, create memos and construct networks in the style of grounded theory. In addition, the instructor will demonstrate the use of Atlas-ti, one of the most popular QDA analysis programs, to suggest the next step in moving participants towards computer-assisted QDA.

You will learn:

- To select and mark text quotations,
- To code and memo using grounded theory,
- To make a simple network diagram,
- The capabilities of Atlas-ti to do the above.

S Reed Early is with the British Columbia Office of the Auditor General. He has taught qualitative data analysis in the college classroom and workshop settings as well as using Atlas-ti extensively in his own work in a range of evaluation contexts.

Session 49: Analyzing Text
Scheduled: Sunday, October 30, 9:00 am to 12:00 pm
Level: Beginner, no prerequisites



NETWORKING SOCIALS

Making the Leap to Evaluation Consulting

Have you thought about moving from employee to consultant? Do you need more information about the benefits and challenges of doing so? Do your skills, work style, risk tolerance, and temperament provide a good fit for independent consulting? Do you want ideas about how to get started, attract and keep customers, and transition on a part- or full-time basis?

We will focus on helping you decide whether and how to transition to consulting either instead of, or in conjunction with, current employment. The workshop will be interactive with a good balance of content, practical exercises, and discussion, supplemented by take-home materials and a list of resources you can explore.

You will learn:

- Whether consulting is for you,
- How to transition from employee to consultant,
- How to start and build a practice,
- How to acquire the skills you need to succeed.

Mary Greich Williams, owner of Mary Williams & Associates, maintains a solo practice but frequently partners with other consultants and specialists. She recently completed her 15th year as an independent evaluation consultant, after 18 years as a consultant and administrator with a large state agency.

Session 50: Leap to Consulting
Scheduled: Sunday, October 30, 9:00 am to 12:00 pm
Level: Beginner, no prerequisites

An Evening at Steam Whistle Brewery

6:30 pm – 10:00 pm, Thursday, October 27, 2005

The Steam Whistle Brewery is located in the Canadian Pacific Rail steam locomotive repair facility (the Roundhouse) built in 1929, providing a taste of Canadian history. It is located near other key attractions such as the CN Tower and the Sky Dome. The evening will take place in two unique event spaces – the Tank Room and the Beer Hall – that can accommodate up to 750 people. The Roundhouse is an architectural gem with large multi-paned windows, 30-foot ceilings, hand-hewn support pillars, exposed red brick, and Steam Whistle's renovation has kept much of its originality in place. The atmosphere is relaxed and very social.

The evening will include a tour of the Brewery, available to small groups throughout the evening, dancing with DJ service provided by Maximum music and a gourmet dinner. A cash bar will be available.

The cost is \$75 Cdn per person and tickets can be purchased via the conference registration form or purchased at the conference Registration Desk until 3:00 pm on Wednesday, October 26.

Joint CES/AEA Luncheon

12:10 pm – 1:45 pm, Friday, October 28, 2005

Carl Doucette, CES President, and Sharon Rallis, AEA President, invite you to a ticketed luncheon where you will have an opportunity to network with conference delegates while enjoying sumptuous food.





THINGS TO KNOW

Conference registration includes admission to all of the sessions held after 3:15 pm on Wednesday, October 26 through to 5:00 pm on Saturday, October 29, with the exception of the Thursday evening Steam Whistle Brewery social and the Friday joint CES/AEA Luncheon that require separate tickets. The conference includes over 580 sessions consisting of plenaries with world-renowned speakers, panels, demonstrations, posters, papers and roundtables. Registration also includes receptions on Wednesday and Friday evenings with beverages available through a cash bar. To keep registration fees low, meals are not included as part of registration. Beverages are available each morning before and after the plenary and each afternoon before the penultimate session.

Professional Development workshops that precede and follow the conference are filled on a first-come, first-served basis. As such, we ask that you indicate your first and second choice preferences on your registration form. **All other sessions** held during the conference are open to all registered attendees. You may attend any session by arriving at the appropriate room before the session begins. We make every effort to ensure that the room size is adequate for the attendance; however, occasionally, a session's seating will fill. If there is a session that is of the highest priority for you, we encourage you to arrive at the beginning of the break.

Ambassadors who have attended previous CES or AEA conferences will be on hand to answer questions about the conference process and to help attendees make the most of the conference. Several ambassadors from the Toronto area will also be available to provide information about local restaurants and sights.

Students are invited to serve as volunteers. Full-time students who volunteer receive a discounted hotel room or waived conference registration. Students volunteer primarily at the registration desk or Career Center. Students who wish to volunteer should go online to <http://www.eval.org/eval2005/aea05.students.htm> to find out more information. There are a limited number of volunteer spaces available and these are filled on a first-come, first-served basis. We encourage you to sign up early!

First time attending either a CES or AEA conference?

As a first time attendee, there are a few sessions that you should try not to miss. These include the Orientation session held on Wednesday from 6:10 pm to 6:40 pm where CES and AEA veterans will tell you how to make the most of the conference and obtain an understanding of both organizations and what they have to offer. That same evening, the Reception includes Information Tables where you can connect with representatives from CES and AEA, as well as their Chapters and affiliates, in order to learn more about programs, services, and ways to get involved.

Meet the Authors corner at Wednesday's reception will feature published authors in the field of evaluation.

Exhibit and Support opportunities are available to those organizations wishing to share their passion for the value of evaluation and the important role it plays in the betterment of society with people who make evaluation their business. Contact the Canadian Conference Secretariat at kathy.jones@thewillowgroup.com for further information or to sign up as an exhibitor, supporter or advertiser.

The Career Center is open Thursday, Friday and Saturday until noon. Find a position, consultant, or employee, review resumes, bios, job announcements and requests for proposals. Career Center services are offered at no charge to conference attendees. To learn more about the Career Center and Recruitment Fair, please go to the CES or AEA conference web sites or e-mail the Career Center Coordinator, Stephen Axelrad, at axelrads@peoplepc.com.

T-shirts – Want a special memento of Evaluation Conference 2005? Custom designed 100% cotton jersey conference T-shirts are available for \$25 Cdn. Place your order via your registration form and indicate the preferred size: S (width 18"); M (width 20"); L (width 22"); XL (width 24"); XXL (width 26"); XXXL (width 28").

Pre/Post Conference and Partner Activities

We anticipate that some people will use the opportunity to take some vacation time and would appreciate the opportunity for pre- and post-conference activities. Following are recommended activities.

- Niagara Falls/Niagara-on-the-Lake is an 8-hour tour that includes viewing Niagara Falls, taking a ride on the Maid of the Mist up under the fall, buffet lunch overlooking the falls and a tour of Niagara-on-the-Lake.
- Canadiana and Pioneer Days is an 8-hour tour including the McMichael Gallery in Kleinburg, lunch at the Doctor's House and a tour of Black Creek Pioneer Village.
- Family-friendly activities include The Toronto Zoo, The Ontario Science Centre and The Children's Museum.

Toronto Tourism at <http://www.torontotourism.com/visitor> provides a Calendar of Events along with other valuable information about Toronto. Check it out and sign up for activities or go to the "Toronto Tours" desk at the Sheraton Hotel.

On the Saturday evening following the conference, outings will be arranged to local restaurants. Stay tuned to the conference web site for more information about "Thematic Dinners".

Questions? Before the event, contact the conference secretariat with any question or concern. We are ready to assist with your registration or answer any inquiry you may have about the conference or membership. On site, you can find staff and volunteers at the registration desk to assist with check-in, directions, and last minute details.



ACCOMMODATION

The Sheraton Centre Toronto is the headquarters hotel for Evaluation 2005 and is located at 123 Queen Street West, Toronto, Ontario, Canada. All conference sessions and workshops will take place at the Sheraton. **Please support CES and AEA by staying at the headquarters hotel.**

The discounted conference rate is \$215 Cdn for a standard single or double room or \$275 Cdn for a room on the club level. These rates are considerably lower than the regular rates for the Sheraton during the Conference period. Please note, the conference rate is available **until September 22, 2005**, subject to availability. We encourage you to consider booking as early as possible, as it is likely that the hotel will fill well in advance of the conference.

You may book your stay at the Sheraton Centre online at <http://www.starwoodmeeting.com/StarGroupsWeb/booking/reservation?id=0503119664&key=9363E> or you may call 1-888-627-7175 from Canada or the US or 1-416-361-1000 internationally. You will be asked to provide one night's deposit to secure the reservation. Should your plans change, please note that this deposit is refundable if notice is received at least seventy-two hours prior to arrival and a cancellation number is obtained. Be sure to identify yourself as with the Canadian Evaluation Society/American Evaluation Association.

Features of the CAA/AAA four-diamond Sheraton Centre Toronto Hotel include fee-based High Speed Internet Access in the sleeping rooms; 2.5 acres of picturesque waterfalls, gardens, and terraces; superb location in the heart of the city's theatre and entertainment district; steps away from The Eaton Centre shopping mall and convenient to popular attractions; host of amenities including the largest indoor/outdoor pool in the city, a 24-hour fitness centre, the full service Senses Spa, two levels of shops and services located within the hotel as well as three restaurants, two lounges, and convenient in-room dining.



ENJOYING TORONTO

Welcome to the World's Best-Kept Travel Secret

Toronto possesses the best features of the world in one clean, safe, friendly place. Consider this:

- A theatre scene rivaled only by London and New York
- More than 80 cultures from around the globe
- Attractions that range from high art to lively family fun
- Polished services for business travelers
- A shopping mecca with international flair
- A friendly, open and welcoming attitude
- Some of the best dining the world has to offer
- Year-round international festivals of film, culture, music and more
- Miles of waterfront, beaches, boardwalks and trails
- One of the safest cities in the world for residents and visitors alike

What could possibly make this any better? How about packing many of our most popular attractions within walking distance of each other! In downtown Toronto, a leisurely walk is all it takes to travel between your hotel room, great sporting venues, the CN Tower, endless shopping, top theatre, the waterfront, and inspired cuisine.

And beyond the vibrant and quirky neighbourhoods of the city are more fabulous attractions, plus breathtaking countryside, Niagara Falls, a world-class wine region and dozens of outdoor adventures – all just a short drive away.

So what are you waiting for? Come to Toronto and experience *the world within a city™* for yourself.



HOW TO REGISTER FOR EVALUATION 2005

Both the American Evaluation Association (AEA) and the Canadian Evaluation Society (CES) are processing registrations for Evaluation 2005. You need only register through one or the other for the conference and workshops.

If you reside in Canada, please register through the Canadian Evaluation Society (CES) unless you hold membership in only the American Evaluation Association (AEA). In that case, register through AEA.

If you reside in the United States, please register through AEA (info@eval.org) unless you hold membership in only CES – then register through CES. The current forms of ID for American citizens (valid Passport or original birth certificate plus driver's license) are all that you will need to enter Canada and return to the U.S. during 2005.

If you reside outside of North America, please register through CES, as they are the hosting Society and will provide travel invitations and services in French to those who require them.

Registration fees will be processed in the currency of the society/association with which you register.

You may join or renew your membership in either CES or AEA through either group's registration forms. We encourage you to consider membership in both groups as part of your registration.



REGISTRATION



Register on-line at
www.thewillowgroup.com/events/CES_AEA2005

Or complete and fax or mail the form to the
Conference Secretariat

CONFERENCE SECRETARIAT INFORMATION

CES/AEA Conference Secretariat
%o CES National Office
1485 Laperriere Avenue, Ottawa, Ontario K1Z 7S8 CANADA
Web: <http://c2005.evaluationcanada.ca>
E-Mail: secretariat@evaluationcanada.ca
Telephone: 1-613-725-2526
Fax: 1-613-729-6206

Professional Workshops

TWO DAY WORKSHOPS – MONDAY-TUESDAY, OCT 24-25

Session 1: Qualitative Methods
-FULL- Methods

Session 2: Quantitative Methods
Quantitative Methods

Session 3: Consulting Skills
Consulting Skills for Evaluators:
Getting Started

Session 4: Evaluation 101
Evaluation 101: Intro to Evaluation Practice

Session 5: Performance Planning
Performance Planning, Measurement and
Reporting for Continuous Improvement

Session 6: Logic Models
Logic Models for Program Evaluation
and Planning

Session 7: Participatory Eval
Participatory Evaluation

FULL DAY WORKSHOPS – TUESDAY, OCTOBER 25

Session 8: Performance Measurement
Performance Measurement

Session 9: Systems Approaches
Dealing with Reality:
Systems Approaches to Evaluation

Session 10: RealWorld Evaluation
RealWorld Evaluation: Overcoming
Constraints

Session 11: Focus Groups
-FULL- Interviewing

Session 12: Coding
Coding? Qualitative Software? Why and How

Session 13: Reporting
Creative, Interactive Strategies for
Communicating and Reporting

Session 14: SEM for Evaluators
-FULL- Evaluation Modeling for Evaluators

Session 15: Eval Methodology
Evaluation Methodology Basics

Session 16: Results Based Approach
Applying the Results Based Approach in
Funding Applications and Ongoing Programs

FULL DAY WORKSHOPS – WEDNESDAY, OCTOBER 26

Session 17: Tools of Quality
Using the Tools of Quality

Session 18: Policy Implementation
-FULL- and Policy Implementation

Session 19: Success Case Method Evaluation
-FULL- e Method Evaluation

Session 20: Rasch Measurement
Using Rasch to Measure Services
and Outcomes

Session 21: Appreciative Inquiry
Using Appreciative Inquiry In Evaluation

Session 22: Needs Assessment
-FULL- ssment

Session 23: Utilization-focused
-FULL- focused Evaluation

Session 24: Theory Driven Evaluation
-FULL- en Evaluation

Session 25: Presenting Evaluation Findings
Presenting Evaluation Findings:
Effective Messaging for Evaluators

Session 26: 360-Degree Feedback
360-Degree Feedback:
Online Methods and Techniques

Session 27: Effect Size, Measures
Using Effect Size and Association Measures

Session 28: Minding Your Mind
Minding Your Mind:
Using Your Brain More Effectively

Session 29: Instrument Development
Improved Instrument Development
Through Group Facilitation

Session 30: Multilevel Models
-FULL- Models in Program Evaluation

Session 31: Values in Evaluation
-FULL- Values Into Evaluation

Session 32: Collaborative Eval
Evaluation Practice: A Collaborative Approach

Session 33: Immigrant Communities
Evaluation in Immigrant Communities

Session 34: Cost-Effectiveness
-FULL- t and Cost-Effectiveness Methods

Session 35: Experimental Design
Experimental Designs in Evaluation

HALF DAY MORNING WORKSHOPS – WEDNESDAY, OCTOBER 26

Session 36: Community Change
Community and Systems Change Efforts:
Evaluation Dilemmas and Methods

Session 37: Empowerment Evaluation
Empowerment Evaluation

Session 38: Performance Management
Building a Performance Management System
for Program Improvement

Session 39: Using Stories
Using Stories in Evaluation

Session 40: Fun and Evaluation
Putting Fun and Evaluation in the
Same Sentence

HALF DAY AFTERNOON WORKSHOPS – WEDNESDAY, OCTOBER 26

Session 41: Programs for Children
-FULL- Programs for Children

Session 42: TRIAGE
TRIAGE : Du nouveau dans le monde des
techniques de groupe en évaluation
Note: This session will be offered in French

Session 43: Survey Design
Survey Design and Administration

Session 44: Swinging Dance
The Swinging Dance of Evaluation:
Lessons in Collaboration and Partnership

Session 45: Cultivating Self
Cultivating Self as Responsive Instrument

HALF DAY MORNING WORKSHOPS – SUNDAY, OCTOBER 30

Session 46: Program Theory
-FULL- Applications of Program Theory

Session 47: Collaborative Evaluations
Collaborative Evaluations:
A Step-by-Step Model

Session 48: Moderator Training
Focus Group Moderator Training

Session 49: Analyzing Text
-FULL- Text and Audio Data

Session 50: Leap to Consulting
Making the Leap to Evaluation Consulting

We encourage you to consider registering online using a MasterCard, Visa or Amex at www.thewillowgroup.com/events/CES_AEA2005. Online registrations are processed the fastest and will increase the likelihood of you receiving your first choice Workshops. If online registration is not feasible for you, please print out this form and mail it to CES, 1485 Laperriere Avenue, Ottawa, Ontario CANADA K1Z 7S8 or fax to 1-613-729-6206.

Section 1: Contact Information

Name: _____
 Title: _____
 Organization: _____
 Address: _____
 City: _____
 Province/State: _____ Postal/Zip Code: _____
 Country: _____
 E-mail: _____
 Telephone: _____
 Fax: _____

Section 2: About You

For name badge purposes, provide your affiliation with a maximum 35 characters including spaces:

What country do you call home? _____
 Please note that this may be different from your mailing address and will be shown on your name badge to facilitate networking and to learn more about international attendees at Evaluation 2005.

Will this be your first time attending a CES or AEA Conference: Yes No

Will you be presenting at this year's Conference: Yes No

Do you have special requirements such as accessibility or dietary and if so what are they?

Section 3: Choose Professional Workshops

Refer to the list and indicate the session number of your first choice and second choice.

- TWO DAY WORKSHOPS – MONDAY-TUESDAY, OCT 24-25
 First Choice _____ Second Choice _____
- FULL DAY WORKSHOPS – TUESDAY, OCTOBER 25
 First Choice _____ Second Choice _____
- FULL DAY WORKSHOPS – WEDNESDAY, OCTOBER 26
 First Choice _____ Second Choice _____
- HALF DAY MORNING WORKSHOPS – WEDNESDAY, OCTOBER 26
 First Choice _____ Second Choice _____
- HALF DAY AFTERNOON WORKSHOPS – WEDNESDAY, OCTOBER 26
 First Choice _____ Second Choice _____
- HALF DAY MORNING WORKSHOPS – SUNDAY, OCTOBER 30
 First Choice _____ Second Choice _____

Workshop space is available on a first-come, first-served basis. There is a \$10 fee for changing your workshop selection once registered.

Section 4: Calculate Workshop Subtotal

Non-members residing in Canada must become members of CES. Non-members residing outside of Canada are encouraged to join CES or AEA to obtain reduced workshop fees. The membership fee is outlined in Section 5.

	Two Day Workshop	One Day Workshop	Half Day Workshop
CES/AEA Members	\$420	\$210	\$105
Non Members	\$480	\$240	\$120
Students	\$220	\$110	\$55

Workshop Subtotal: \$ _____

Section 5: Register for the Conference

Evaluation 2005 includes over 580 sessions (panels, roundtables, posters, papers) starting on Wednesday, October 26 at 3:15 pm and ending Saturday, October 29 at 5:00 pm. Conference registration includes admittance to these sessions plus two receptions with cash bars on Wednesday and Friday.

Please do not send registrations after October 17 – only on-site registrations are accepted after that date.

Fees are in Canadian Dollars.

A. Conference Fee

	Individual	Student
<input type="checkbox"/> Received on or before Sept 15	\$245	\$75
<input type="checkbox"/> Received after Sept 15	\$295	\$85

\$ _____

B. CES Membership Fee (new or renewing members)

You must renew or become a new member of CES if you reside in Canada. The membership fee is for a 12-month membership in CES. You also have the option of applying for discounted membership in AEA – see I below. Students must attach a copy of valid ID attesting status.

- CES Individual \$116.82
- CES Student \$42.99
- CES Senior (60 years+) \$61.68

\$ _____

C. Workshop Subtotal

\$ _____ Bring forward subtotal from Section 4.

D. Social Event – Steam Whistle Brewery

\$ _____ ___ tickets @ \$75 for the Thursday, October 27 social

E. Joint CES/AEA Luncheon

\$ _____ ___ tickets @ \$52 for the Friday, October 28 luncheon

F. Conference T-Shirts

\$ _____ T-shirts @ \$25 to be picked up at the Registration Desk / indicate quantity and size

___ S ___ M ___ L ___ XL ___ XXL ___ XXXL

G. Subtotal

\$ _____ Total of A, B, C, D, E and F

H. GST Component (GST #12276 9094 RT0011)

\$ _____ Add 7% of Subtotal G. GST must be calculated unless an official Canadian GST exemption letter is attached.

I. Discounted AEA Membership Fee

CES members are entitled to discounted membership fees in AEA. Your contact information will be provided to the AEA Office for processing and you will be asked to complete profile information.

- AEA Individual membership for members of CES \$75.00
- AEA Student membership for student members of CES \$50.00

\$ _____

J. Total

\$ _____ Total of G, H and I.

Section 6: Payment Information

We are unable to process your registration or hold workshop space without payment. Please check your payment type and provide full payment information below. Payment must be submitted in Canadian Dollars.

- Credit Card
 - Visa MasterCard/EuroCard American Express

Card Number: _____

Cardholder Name: _____

Expiry Date: _____

Cardholder Signature: _____

- Cheque in Canadian dollars payable to CES/AEA Conference 2005 % The Willow Group and drawn on a Canadian bank enclosed.
- Electronic Bank Transfer – please contact the Conference Secretariat to obtain information on how to transfer funds directly.

Cancellation: All cancellations must be received in writing (e-mail or fax) by October 17, 2005. A 25% administration fee will be applied to all cancellations and will be processed post-conference.