Southeast Evaluation Association Newsletter

P.O. Box 10125 ❖ Tallahassee, FL 32302 December 2007

SEA Makes It to 20 Conference Years!

The 2008 Conference will be SEA's 20th annual conference. This is an exciting milestone for SEA—20 conferences, each larger than the last! Our first conference, back when SEA was fairly new, was organized by Nancy Ross. Imagine having to do all this without the institutional knowledge and the help of all the people who have "always been involved!" Anyway, Nancy did a great job and pulled off our first annual conference back in 1989. If I remember correctly, she asked if I would put together the conference program document, and I became part of SEA history then. We picked up a lot of other great folks along the way.

Now it is time for our 20th Annual Conference in 2008: Evaluation and Accountability: A Formula for Success. Our featured speaker will be Dr. Daniel Stufflebeam. I am sure you have heard his name in evaluation circles—he is one of the pillars, one of the greats of our field. He founded the national Joint Committee on Standards for Educational Evaluation, chaired it during its first 13 years, and was the principal author of the original Joint Committee standards for program evaluation and personnel evaluation.

In addition to his work on standards, he is also famous for his work on evaluation models. He developed one of the first models for systematic evaluation, the CIPP Model for Evaluation (Context, Input, Process, and Product), which is widely used in education.

For our pre-conference workshop February 27, Dr. Stufflebeam will divide the day into two topics: evaluation models and results. As part of results, he will present Autopsy of a Failed Evaluation: Examination Against the Program Evaluation Standards. This will be a fascinating look at an evaluation that failed compared to the "red book" standards. What could have been done? Could the evaluation have been saved?

Dr. Stufflebeam will also give the keynote speech that opens the conference February 28-29. He recently (2007) retired as a Distinguished University Professor from Western Michigan University (WMU). Dan and his wife Carolyn divide time each year among their farm in Kalamazoo, their Lake Michigan house in South Haven, and their house in Lady Lake, Florida.

Message from the President

I hope you have survived the summer! Your Board, coordinator and other volunteers have been very busy, and I would like to start my letter by praising all they have accomplished! You, too, can participate in making good things happen: if you have not yet found your SEA volunteer niche, you will find ample opportunities scattered throughout the newsletter.

Difficult as it may be to believe, we are hard at work on our 20th annual SEA Conference, which will be held February 27 - 29 at the Tallahassee-Leon County Civic Center. Put it on your calendars! I find it hard to believe it has already been 20 years since we held our first Conference!! Susan McNamara has pulled off a real coup by getting Dan Stufflebeam here for the pre-session and keynote. Dr. Stufflebeam is one of the pillars of the evaluation field, so this will give you an opportunity to spend time with a real legend. Not only that, thanks to the efforts of several Board members, you can now register on-line for the Conference and pay by credit card or P-card!!!

We had amazing geographic and background diversity at our last Conference, and we'd like to improve on it even more, so be sure and share this newsletter with associates involved in evaluation, program planning, contract management and auditing. If you'd like to be part of the group that plans the 20th anniversary celebration or helps with logistics, please contact Susan at susan@bitbrothers.com. It is an easy and fun way to get involved. It is an especially good opportunity for those who live at a great distance from Tallahassee.

The Program Committee, headed by Mary Kay Falconer and Tamara Bertrand-Jones, has hosted a series of monthly brown-bag lunches on measurement. The discussions have been excellent and have afforded an opportunity for the diverse attendees to share experiences across disciplines. Attendance has been excellent, and we have been able to offer telephone access to those who live at a distance.

The first of the series, on Friday, April 27, was on Retrospective pre-testing, led by Mary Kay Falconer of the Ounce of Prevention Fund of Florida. Subsequent sessions were held on May 25, July 27, August 24, and October 26 on "Participant Retention in Program Evaluations", "Measuring Customer Satisfaction", "Web-Based Surveys", and "Challenge of Cost-Benefit Analysis". Look for more information on each of the brown-bags elsewhere in this newsletter and at SEA's website. The success of this venture has depended on members stepping forward to offer topic leadership and/or locations. If you have a topic you would like to propose, or a space you would like to offer, step up to volunteer!

Tamara Bertrand-Jones has also taken the lead in conducting a member survey to help guide future programs and activities. Look for her article in this newsletter. Also, look for Sean Little's book review and discussion on how we might best take advantage of technology for ongoing training and mutual support. Sean is a member who stepped up offering to lead these efforts. You can too!

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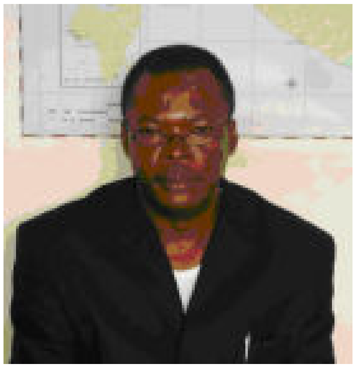
Inside This Issue

Congratulations to an Honorary Member of SEA!



Peter Doe-Sumah currently serves as M&E Coordinator of the Liberia National Commission on Disarmament, Demobilization, Rehabilitation, and Reintegration (NCDDRR). He is responsible for the coordination and supervision of M&E activities. He also carries out scheduled monitoring visits to projects and formal education institutions to assess achievements and potential stumbling blocks in reaching the program targets as well as capturing quantitative and qualitative data to determine impacts and gaps experienced with individual implementing partners.

Mr. Doe-Sumah worked with the Bazzi Brothers Group of Companies (Import & Export) for 14 years as Administrative Assistant/Personnel. This work provided him with diverse experience in business administration. He supervised and coordinated the activities of the staff, maintained a personnel record of approximately 350 workers, served as liaison between government entities and the company, and deputized for the Chairman/Managing Director and President to meetings they were unable to attend (i.e. Liberia Chamber of Commerce, Liberia Manufacturers Association, Liberia Timber Association, Forestry Development Authority, Wholesalers Association of Liberia) and management representative to the National Labor Court.

Mr. Doe-Sumah is immediate past chairman of the Board of Directors of the Joseph Jenkins Roberts United Methodist School (k-12). He presided over all meetings of the School Board, scheduled all Executive Committee and Board meetings, appointed standing committees of the Board as deemed necessary, served as signatory to all accounts of the school, etc. Besides, he was instrumental in the establishment of the Mother Ruth B. Doe Endowment Fund of the J.J. Roberts United Methodist School, launched on February 7, 2003. The Fund is aimed at the standardization of the science and computer laboratories; reduce tuition to allow for increase student enrollment; provide equitable salary structure, and establish a faculty/staff development program.

He is current president of the William V.S. Tubman High School Alumni Association and presides over all meetings of the Alumni Association as well as the Executive Committee meetings, coordinates the affairs of the Association, liaise with the school, alumni members in the Diaspora, the Monrovia Consolidated School System (MCSS) Central Office, and the Ministry of Education concerning matters appertaining to the school. Under his leadership as President of the Tubman High Alumni Association, he helped to quell a major student demonstration in Monrovia during the period March/April 2004.

He received his undergraduate degree in Mathematics from the University of Liberia and a certificate in research methodology from the Liberia Institute for Public Administration (LIPA).

His ambition is to become an M&E Specialist. This desire stimulates his quest to seeking formal training in monitoring and evaluation. It is against this background that he came to know about SEA through search of the World Wide Web. Mr. Doe-Sumah developed special interest "on first sight" in SEA and immediately sought membership with this esteemed organization. The SEA Board after a period of consideration admitted him HONORARY MEMBER of SEA, granting him privilege information about the organization. He is very much grateful for this distinguished opportunity – THANKS TO THE BOARD AND THE ENTIRE MEMBERSHIP OF SEA.

His philosophy is, "If I can help one more person become somebody, my life on earth would have been fulfilled".

Participant Retention in Program Evaluations

As part of SEA's Methods and Measurement Series, a brown bag lunch discussion was held on May 25, 2007, to address the topic of participant retention in program evaluations. The meeting was located in the TCC Institute, lower level of the Mary Brogan Museum. Four questions guided the discussion and they were:

- Where do measures of retention fit in a LOGIC Model?
- Are measures of retention appropriate in summative or outcome evaluations?
- What are common measures of retention and what are their strengths and weaknesses?
- How can we help programs improve participant retention?

At the beginning of the session, the facilitators of the session shared a couple of examples of Logic models (Kellogg Logic Model Development Guide at www.wkkf.org/Pubs/Tools/Evaluation/Pub3669.pdf and The University of Wisconsin Extension, local evaluation project at http://www.uwex.edu/ces/pdande/evaluation/evallogicmodelexamples.html). Participants attending the session shared some of their experiences with participant retention in their evaluation research. There were some variations across the professional fields (i.e., education and social service programs). All participants agreed that participant retention should be included in LOGIC models as outputs or in some cases, retention might actually be a short-term outcome.

The importance of retention to the success of the program might determine where the measure is placed in the LOGIC model. It was also acknowledged that serious consideration should be given to including participant retention in summative or outcome evaluations. Common measures of participant retention mentioned were percentage of the participants retained by time intervals in a program (e.g., 3, 6, and 12 months) and average number of days in a program or length of stay (LOS).

When discussing measures, it was also emphasized that it would be important to consider the length of time for completion and schedules for the actual delivery of services which might be used to adjust the measures in order for them to reflect the actual length of time services were received. Planning for the collection of data that would allow the calculation of the appropriate retention measures was discussed in addition to identifying codes to indicate reasons for a participant being closed. These reasons can help identify aspects of a program that might require more attention and improvement.

A couple of examples of research projects that assisted a program in their efforts to improve participant retention were shared in response to the fourth question. Looking at retention across participant subgroups, analyzing relationships between participant characteristics, program experiences and length of stay in a program, and collecting information from direct service workers using a modified Delphi technique were some of the approaches that had been used in recent research to improve participant retention.

At the end of the session, there was a brief discussion of topics for future brown bag lunch discussions. One suggestion was mixed methods or methodological options and the use of one page scenarios to stimulate discussion of appropriate methodologies. Questions regarding this workshop should be directed to Mary Kay Falconer (mfalconer@ounce.org).

We would like you to offer your suggestions for future discussions and your assistance to lead one of these discussions would also be appreciated. Please email your name, the topic, and the location for the session to Mary Kay Falconer at mfalconer@ounce.org.

Increasing Access to SEA Brown Bag Lunches

Sean Little

People outside of Tallahassee area find it difficult to participate in Tally-centric SEA programming. Just before the July 27, brown bag lunch (Measuring Customer Satisfaction), I contacted SEA about using technology to make these brown bags accessible to non-Tally people. I then found out that SEA already had access to conference calling and video conferencing but few had utilized these technologies. As other people might be interested but not know about the technology available, it sounded like a discussion for the newsletter.

How feasible is virtual attendance? I attended the July brown bag luncheon and found the following:

1) male voices carried better than female voices,

2) questions from the audience were difficult to hear,

3) accented voices were problematic, and

4) raising my hand to ask a question was not an option on a conference call (duh!).

Still, I only missed about 10% of the presentation. Prior to the presentation, someone from SEA (thanks) e-mailed the handouts to me, making following along much easier.

An e-mail could be sent to the off-site participant that explained virtual etiquette which could resolve the problem of asking questions. Simply, testing microphone placement beforehand might resolve the audio problems. Conference call technology worked adequately, and with some minor improvements could be an even more effective means to participate.

While all of us have been on a conference call, fewer are familiar with video conferencing, which will probably involve IT people at both the sites and be restricted to those sites with video conferencing capabilities.

In order to make these events accessible to non-Tallahassee people, SEA needs to resolve several issues:

1) publicity;

2) cost of technology;

3) cost for long-distance non-CSE members; and

4) technological coordination.

A line on the advertising flyer could easily give a contact for virtual access. This contact person could pass on the conference call number, scan and e-mail handouts, and e-mail conference call etiquette, the video conference specifications, and an IT contact's e-mail address.

As usual, cost creates problems. If SEA has a toll-free number, this could be utilized, with relatively minor impact. If not, the cost for a toll-free number will have to be borne by some person, organization, or state agency. My guess is that video conferencing would be more expensive than conference calling. Another money issue concerns non-SEA members who might want to attend a brown bag. While I doubt that thousands of non-SEA members will want to spend their lunch-hour listening to a discussion of the retrospective pretest, SEA should develop a policy for this question. Multiple collection points and collection people could easily become a bookkeeping disaster. Perhaps non-members could be required to pre-pay using PayPal.

These issues occurred to me as I virtually attended the Brown Bag. None of these issues seem insoluble. Please e-mail suggestions comments, and interest among non-Tally people and comments to Sean Little (littles@dor.state.fl.us).

* Sean Little drifted into evaluation in mid-career. He has a MA in Psychology with a concentration in Social Psychology and currently works in Monitoring and Evaluation in Child Support Enforcement in Fort Lauderdale

Web-Based Surveys

On August 24, 2007, SEA sponsored a "Methods and Measurement" Brown Bag Lunch Discussion on Web-Based Surveys. The session was facilitated by Tamara Bertrand-Jones, and it was held in a meeting room at Tallahassee City Hall. Around 30 people attended. In addition to providing a summary sheet on "helpful tips", a paper written by D. Dillman, R. Tortora, and D. Bowker entitled, "Principles for Constructing Web Surveys" was also distributed to session participants. Tamara discussed several web survey applications that are available and conducted a demonstration of some of the features for two of the web-based applications, Survey Monkey and SurveyZ. Several other applications were mentioned during the session by other participants, including MRinterview (SPSS), REMARK, Perseus, and SurveySnap. Staff from one state agency mentioned the use of customized software developed by a university. Among the issues and topics addressed by the participants, one that was of interest to several participants was the compliance of the software with ADA requirements. Security of the survey application was raised as a concern. Challenges associated with web surveys included spam filters and trying to find an application that has all of the features desired, downloading response data to EXCEL or SPSS being one of those. Zoomerang was mentioned as an application that offers several translations for a survey instrument. The importance of pilot testing an instrument with focus groups was still recognized as important along with the inclusion of incentives to make sure respondents complete the survey instruments.

Questions regarding this workshop should be directed to Dr. Bertrand Jones (TBertrand@admin.fsu.edu). We would like you to offer your suggestions for future discussions and your assistance to lead one of these discussions would also be appreciated. Please email your name, the topic, and the location for the session to Mary Kay Falconer at mfalconer@ounce.org.

Measuring Customer Satisfaction

On July 27, 2007, SEA sponsored a "Methods and Measurement" Brown Bag Lunch Discussion on measuring customer satisfaction. Facilitated by Bill Dahlem and Rachel LaCroix with the Agency for Health Care Administration (AHCA), the meeting took place in AHCA's Building 3 (Conference Room C). Bill and Rachel distributed a handout entitled "Measuring Consumer Satisfaction – The Florida Health Plan Consumer Information Website" to all who attended. In 1999, the Florida Legislature directed AHCA to "conduct an annual survey of the satisfaction of members of health maintenance organizations" (s. 641.58(4), Florida Statutes). Bill and Rachel discussed the target audience and the instrument selected to survey adults and child-parent units, then reviewed who administered the survey and how they analyzed the data. Finally, Bill and Rachel shared the techniques used to disseminate the results. For more information from this discussion, please see SEA's website and click on the title "Measuring Customer Satisfaction."

Message from the President

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Before ending this column, I would like to bid farewell to Dogon Tozoglu, who has left the Board and Tallahassee to pursue a career in Educational Administration and to offer congratulations to Margarida Southard, who has just retired from the Leon County School system. Margarida has been a pillar of SEA, not only as former president, but as Conference planner and presenter, teacher, and promoter of SEA activities to young evaluators. She has also built the school system's evaluation program to be among the finest in Florida. We wish her all the best and send special greetings to her former staff, who miss her very much already.

Are we missing something you'd like to see? Drop us a line!

Best regards,

Betty Serow, SEA President

Become a Member of SEA!

The **Southeast Evaluation Association** (SEA) is a local chapter of the American Evaluation Association. We represent evaluators and evaluation-related professionals from the state, university, school system (local) and private sectors. Our members come from a variety of backgrounds: policy analysis, program auditing, teaching, program evaluation, and performance measurement. SEA's annual conference attracts nationally recognized speakers and participants from the entire southeast region. Several agencies use our programs and conferences as low cost training and networking opportunities for their employees.

Annual membership ($30; $10 for full-time students) offers reduced registration fees for the Annual Conference, Pre-Conference Workshop, Essential Skills Workshop, and the various training sessions held throughout the year. Members also receive a periodic newsletter throughout the year. The newsletter is a great way to keep up with the SEA activities and innovative research in the field of evaluation. If you have any questions, please don't hesitate to email us at: seacoordinator@southeastevaluation.com. SEA information can be obtained via the World Wide Web at: http://www.southeastevaluation.com

Southeast Evaluation Association

The objectives of this Association shall be:

To promote improvement and accountability at all levels of policy and programs.

To encourage, stimulate and provide training for evaluation personnel.

To foster and promote program evaluations by providing opportunities to exchange information and ideas relating to evaluation.

To promote the development of theory and the acquisition of knowledge on which to base professional program evaluations.

To promote the use of standards in the evaluation profession. In accomplishing its mission of "Advancing the Profession," SEA encourages the knowledge and use of appropriate evaluation standards by its members. In doing so, the Association recognizes the professional judgment of each member decides which standards are best suited to a particular context.

Want to get involved in SEA?

Well, here's how: contact SEA at seacoordinator@southeastevaluation.com. There are numerous opportunities for members to help out…No contribution is too small!

WANTED:

SEA Historian: The historian will collect documents, information, photos, etc., from all the years of SEA and assemble it into a historical document and/or website for the ongoing use and reference of SEA members.

Thanks to everyone who helped with this newsletter:

Mary Kay Falconer,
Bernadette Howard,
Sean Little,
Susan McNamara,
Betty Serow, and
Christopher Sullivan.

Book Review

Yin, R.K. (2003). Applied Social Research Methods Series: Vol. 5. Case Study Research Design and Method: (3rd Edition). Thousand Oaks, London, New Delhi: Sage.

Reviewed by Sean Little, SEA Member

Yin defines a case study as "an empirical inquiry that investigates contemporary phenomena within its real-life context, especially when the boundaries between phenomena and context are not clearly evident." (page 13). Four criteria determine if a case study will be the appropriate method for researching a phenomena: 1) the context and the phenomena cannot be separated, 2) the maturation of the phenomena over time forms a key area of interest, 3) the research does not require quantification, and 4) the research does not require control over behavioral events.

These four criteria point to one of the great strengths of case studies for reporting. Case studies have similarities with narrative forms dating back to tales told around Neolithic campfires. Unlike linear regression, non-professional audiences can actually comprehend case studies. Of course, the tales told around Neolithic campfires know nothing of rigor or empirical proof, absorbed in grad school over obtuse tomes and incredibly large amounts of caffeine.

Yin argues that qualitative cases have nebulous boundaries. Consequently, the researcher must impose boundaries through two tools: the case study protocol and the case study database. In the protocol, the researcher states the major questions of the study, along with field procedures, an overview of the entire project and a guide for the case study report. While subject to revision, the researcher should write the protocol in its entirety prior to data collection.

In the case study database, the researcher links each conclusion to a particular piece of evidence collected and a case study question (a chain of evidence). The accessibility of the protocol and case study database to other researchers increases reliability. In order to increase construct validity, Yin recommends using multiple sources of evidence, having key informants review a draft of the report and establishing a chain of evidence which is documented in the case study database. For increased internal validity, Yin recommends pattern matching, explanation building, addressing rival explanation, and using logic models. Yin recommends using theory in single case studies, and replication logic in multiple case studies to increase external validity.

A case study has four basic designs: 1) single case holistic 2) single case embedded, 3) multiple cases holistic, and 4) multiple cases embedded. "Embedded" refers to another research study within the primary case study. "Holistic" refers to a primary case study with no other studies embedded within. The embedded study can be another case study or any other type of study.

Yin uses allusions to the detective novel to emphasize research as puzzle solving, a welcome relief from the density of social science methodological writing. On the down side, I found some of his terms off-putting, particularly 'holistic' to describe a case study without any sub-studies. I was also not clear on why Yin labeled studies within studies as 'embedded' rather than the more common term 'nested'. Like many texts written to introduce a methodological specialty, the book could benefit from a glossary. While Yin strongly recommends having research subjects review the report to increase construct validity, he states that if the subjects disagree with the interpretation, the researcher has no obligation to include their disagreement in the final report. This seems to me both ethically and scientifically questionable.

Like most of the Sage Applied Social Research Methods Series, this volume is a compact, readable, relatively inexpensive, and a worthwhile way to improve your skills, despite the reservations listed above. One could do a lot worse than read one volume a year from this series.