Southeast Evaluation Association Newsletter

SEA

September 2010

Advanced Essential Skills Workshop to be Offered in October, 2010

By Gary Walby

People who have taken the Essential Skills training have, over the years, asked if there would be a follow-up to the Essential Skills Workshop. Our response has gone from "not sure" to "yes" in the last couple of months as we have moved forward to design our Advanced Essential Skills workshop.

What does that mean exactly? In the recent past you and many others were offered the opportunity to help select topics for the Advanced Essential Skills (AES) workshop via SurveyMonkey. You were asked to select and rank order from thirteen (13) possible choices (Here at SEA we scoff at superstition!). We want to thank the 85 people who responded. You have helped to set our agenda!

Save the date on your calendars. **The new AES workshop will be offered on October 25-27 in Tallahassee, Florida.** The workshops will be interactive, pragmatic, and skill-enhancing. Each instructor will be selected for their ability to adhere to the golden rule: *instruct onto others as you would have them instruct onto you.*

Each subject area session will consist of a full three-hours of instruction, with two sessions per day. Over the three day period, there will be six sessions. Like the well received Essential Skills training, the location will be comfortable, the instructors professional, lunch will be served as part of the cost of the workshop, and a block of hotel rooms will be reserved at a more than reasonable price. What more could you ask? Oh … what is the cost of this information bonanza? Good question.

SEA Members (remember, it only costs $30 to join SEA annually): $125 for one day, $225 for two, or $300 for all three days. All participants, regardless of membership status, will have the option to join for one, two or three days. Keep in mind that as SEA members you also receive a discount for the SEA annual conference which has been going on now for over 20 years as well as reduced rates to other trainings!

Clip art courtesy of MSoffice.com

Non-SEA Members: $150 for one day, $275 for two or $375 for all three days. (If you just did the math, you know it pays to join. And … no, I am not ashamed of myself).

We have selected the top six choices from our peers who voted and have a temporary schedule in place. The schedule and temporary descriptions that were used in the voting are listed on page 2. Please note that these are subject to change and one or more may be substituted for a different subject area if either the instructor or the curriculum does not meet the interactive or practical aspect expected. We hope to see you there.

(For Subject Areas and Session Dates, see Page 2.)

Register Now for the AES Workshops at the SEA Website

http://www.southeastevaluation.com/program.php

Sign up for 1, 2, or all 3 days! Limited to 35 people per day.

Inside this issue:

Advanced Essential Skills Workshop to be Offered in October, 2010
Subject Areas and Dates

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Monday, October 25

Evidence-Based Evaluation (morning session): This subject area consists of the following topics: how certain terms are used (evidence-based, best practices, etc), examples of hierarchies, necessary steps for assessing the embedding or implementing of an evidence based practice. This subject area will also examine developing an evidence based evaluation.

Policy Evaluation (afternoon session): An increasing number of evaluations are targeting the genesis and effects of public and corporate policies. Policy evaluation is a systematic process for assessing the design, implementation and outcomes of public policies. This selection will offer a practical overview and steps for implementing policy evaluation as well as providing an overview of some models for policy evaluation.

Tuesday, October 26

Data Management (morning session): Evaluators have varying levels of training in designing and implementing evaluations. Though they are often taught about quantitative and qualitative data, training in selecting the data points needed to answer evaluation questions, designing a basic data system, selecting items for standard, or "canned" reports, knowing what and how to store qualitative data that supports analysis, and other points are rarely covered. This selection will address pragmatic aspects of data point selection, data collection, data system management, data storage, and other data related issues.

Pragmatic Quantitative Skills (afternoon session): Quantitative analytic methods are often viewed as the core of many evaluations when it comes to describing and assessing the impact of an intervention, program, or initiative. When to use descriptive versus inferential statistics and how to get the most out of descriptive statistics for evaluation are not common training for evaluators. Many evaluators will have a couple of statistics courses but will have to struggle with choosing and applying statistical procedures in an evaluation setting. Effect sizes, confidence intervals and other options for quantitative analysis are given limited time but are often powerful tools for an evaluator. This selection will provide practical, hands on training in selecting and using statistical tools that work in the day-to-day settings and responsibilities of evaluators.

Wednesday, October 27

Mixed Methods in Evaluation (morning session): Designing and implementing truly mixed methods evaluations requires more than utilizing a quantitative technique, e.g. a survey, and a qualitative technique, e.g. focus groups. Mixing methods requires planning at the design stage with an understanding of which question each technique is expected to answer and how to blend them into a gestalt, where the knowledge gained is greater than the sum of the parts. This selection will provide information on how to structure mixed methods evaluations to provide integrated versus parallel analysis.

Advanced Qualitative Analysis (afternoon session): Qualitative analysis for evaluation is often little more than frequency counts of text that are listed in support of quantitative findings. Examples of content for this selection include qualitative based evaluation skills such as: generating qualitative evaluation questions, merging evaluation theory with qualitative analysis, using qualitative methods more systematically in evaluation, deciding on *a priori* coding structures, developing themes, using emergent codes and themes, drilling down for greater depth of understanding, and deciding when data saturation or preselected numbers of data collection opportunities, e.g. observations, interviews, or focus groups, are best used.

We hope this whets your appetite! Please pay attention to e-mails and check our website as the workshop will be limited to only 35 participants each day.

The President's Message: Time to Engage

By **Gary Walby, Ph.D.**

Photograph courtesy of Dr. Gary Walby

It seems as if every day there is more bad economic news, and in some cases it comes at the expense of logic. Some companies post record profits but also post additional layoffs. People are saving more than ever but are chastised because this is slowing the recovery from recession since 70% of the U.S. economy is driven by consumer spending. Be frugal, but spend! Be afraid, but have hope! What has this got to do with evaluation? Everything.

This is a good time to be an evaluator. Not for economic gain because, again contrary to logic, as organizations and agencies want to make sure that they are spending their shrinking dollars wisely, they are less apt to employ those that can help them determine their effectiveness and return on investment. Which, of course, is us. Evaluators. Individuals trained to work with organizations and other entities to improve their performance, to increase their effectiveness, and to better their position to compete for limited resources. But we all know this. So why am I preaching to the choir? Because knowledge is only useful when it is translated into positive action.

Commiseration is a wonderful thing, especially on a Friday night after a long hard week of work with a good glass of your favorite wind-down beverage, maybe a little soft jazz in the background and people you care about in the foreground. Remember the last time you did that? Hopefully you had the opportunity and hopefully again you regained the energy and drive to get back in the fight. As my favorite sensei said to me many years ago, sometimes when you are in a fight, it's good to change the tempo.

Evaluators at the national level are working to move forward an evidence-based agenda. We are as often promoting an evaluation agenda as we are trying to push back against ill-advised 'truths' that people sometimes like to hear in order to either make sense of something complex (it's easier) or because it fits their own agenda (it's profitable).

Methods proven excellent in drug trials or other closed system experiments are often unethical or compromised in community or program evaluations because the 'control(ed)' group is anything but and the messiness in the real world requires innovation and attention to context to a degree unnecessary when people are taking this pill or that one. This is just one of the many big issues bandying about in evaluation circles. Think about the many others and ask yourself if you have gotten sufficiently involved.

We've all heard the debate on what is considered evidence amongst other issues; we pay attention to Evaltalk and other listserves. We discuss it at the office or at home (assuming we can find an interested party. My cat, Smudge, always listens attentively).

But, are we effectively using our collective strength? Are we sharing our ideas in the right forums and in the right ways to be heard? Are we collaborating to strengthen our voice? Are we even bothering? Are we concerned that we are not qualified and who would want to hear from us anyway? I would. And so would many others. As evaluators, we often act alone or in small teams and feel isolated as we armor ourselves in objectivity. Keeping in touch with what our federal and state leaders are doing is time well spent.

Adding our voice, becoming actively engaged, working with others to develop a position paper or to challenge the author of another paper, presenting at a conference, taking a risk and asking questions at a conference, workshop or meeting (how many times have ANY OF US swallowed a cogent comment or question?), and many other small ways are available for us to work together, find like-minded people, engage in spirited debate, and end the isolation. Now, more than ever, when it appears that our country is at a crossroads no matter the subject, is the time to engage, to change the tempo, to fight the good fight.

As my sensei asked, do you want to go down cowering, go down swinging, or possibly be left standing? The latter two options are only available if you engage.

Sincerely,

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Knowledge is only useful when it is translated into positive action.

G. Walby (2010)

Webinar on Logic Models and DoView Software Drew Participants From Across the Southeast

By Steve Lize, Ph.D.
Co-chair of the Program Committee

The Southeast Evaluation Association stepped into the world of virtual communications by hosting its first webinar. On August 4, Dr. Pippin Whitaker, Empowerment Evaluator consulting with the Florida Coalition Against Domestic Violence, presented a training on building logic models for program evaluation and demonstrated the software DoView for logic model planning. The webinar format was possible thanks to Karen Childs at the University of South Florida Mental Health Institute who provided the webinar software, audio, and tech support.

The webinar drew nearly 50 participants from all over the Southeast: Florida, Georgia, Louisiana, North Carolina, and South Carolina. Participants also logged in from North Dakota and Pennsylvania. The number of participants set a record for attendance of SEA brown bag and professional development sessions.

The webinar covered the concept of logic models in general, their application as frameworks for program evaluation, and the use of DoView software for logic models and evaluation planning. The logic model concepts were based on the Kellogg Foundation logic model, which emphasizes inputs, activities, outputs, outcomes, performance measures, and influences. These planning components can be applied to form a framework for program evaluation.

Logic models enable program managers and evaluators to specify clearly a program's goals, activities, and results. This detail allows for a more precise measurement of processes (fidelity to and efficiency of inputs, activities, and outputs) and outcomes – the intended change resulting from the program. The DoView software allows for visual organization of program components as they relate to outputs and outcomes. The interface is similar to a flow-chart builder with color-coded text boxes enhanced with notes and links to quickly move through details while allowing for visual representation of how goals, activities, outputs, and outcomes are related.

To find out more about logic models, evaluation planning, and DoView, follow the website links below.

Kellogg Foundation Logic Model Development Guide:

http://www.wkkf.org/knowledge-center/resources/2010/Logic-Model-Development-Guide.aspx

Centers for Disease Control and Prevention (CDC) Evaluation Framework:

http://www.cdc.gov/eval/framework.htm

DoView:

http://www.doview.com/

As the first webinar for SEA, the presentation was not without technical glitches. As with many premier performances, we learned from these hiccups and have identified solutions so that future webinars run more smoothly. Here are some lessons learned for future webinars,

First Lesson: The voice over internet audio went silent for many participants after a sound check. Apparently, web browser programs do not always cooperate with webinar software and switching webinar activities can throw the internet audio off. Participants with Firefox seemed to have better luck than those using Microsoft Explorer.

Second Lesson: Most participants who lost voice over internet audio stayed logged in and used the conference call option for audio. However, the conference call program was set to announce incoming and outgoing callers, which was really annoying to participants. In the future this setting will be turned off. The conference call option was crucial and should be a component of any webinar to ensure that participants have audio. Not every participant has computer speakers or headphones and some participants may find phone audio more convenient and accessible.

Third Lesson: SEA has an opportunity to use webinars to generate revenue. Members could benefit from free participation and non-members could be charged a small amount, for example $5 to $10. Most participants in the logic model webinar were not members.

Given the relative success of this first webinar, I look forward to more webinar events in the future. Of course, we need members to step-up to volunteer as coordinators, presenters, or hosts of the technology. The SEA would like to thank Dr. Pippin Whitaker for her presentation and Karen Childs for hosting the webinar.

If you would like to coordinate a webinar or in-person professional development session, or serve as a trainer or panel discussant, please contact SEA program committee co-chairs: Steve Lize, Ph.D. (lize.steve@oppaga.fl.gov or Mark Baird, Ph.D. (mark.baird@fldoe.org).

The Needs Assessment Kit (5 volumes)

James Altschuld, Series Editor

Amazon.com sells all five volumes for $139 (8/7/10).

Vols. 2 and 4

Reviewed by Sean Little

The Needs Assessment Kit consists of five short volumes on designing, conducting, and analyzing needs assessments. If the name of the series editor sounds familiar, James Altschuld regularly conducts professional development workshops on needs assessment before the AEA annual conference and was the AEA thought leader in the month of August. (Full disclosure, I attended his professional development workshop at AEA 2007). Both in this kit and in his role of thought leader, Altschuld has expressed concern regarding the relative lack of journal articles on needs assessments and the apparent decline of needs assessments within the field. It is not clear why there has been an apparent decline in the emphasis within evaluation on needs assessment. The authors suggest that the lack of publication may result from a relatively large number of needs assessments that didn't work. If that is true and they remain unpublished, no one can learn from the needs assessments that didn't work. Obviously, this harms the field. I suspect that Altschuld put together this kit in order to revitalize the field. I wish him success.

The five volumes are as follows: Vol. 1: *Needs Assessment: An Overview*, Vol. 2: *Needs Assessment: Phase I Getting Started*; Vol. 3: *Phase II Collecting Data*; Vol. 4; *Needs Assessment: Analysis and Prioritization*; and Vol. 5: *Needs Assessment: Phase III Taking Action for Change*. In an effort to be more "green" and to save money, I reviewed library copies rather than purchased copies. Due to availability, I was not able to read them in sequential order. Consequently, these reviews only covers Volume 2 and Volume 4.

Needs Assessment: Phase 1 Getting Started (Vol. 2)

James W. Altschuld and J.N. Eastmond, Jr.

Series Editor: James W. Altschuld

Sage: 135 pages

Reviewed by Sean Little

Altschuld's model divides the needs assessment process into three phases: Phase I, preparation; Phase II, data collection; and Phase III, prioritization, analysis, and reporting. Phase I has two key tasks: to establish the needs assessment committee (NAC) and to identify the potential areas of need for which to collect data in Phase II.

Two distinct roles emerge in needs assessment: the needs assessor (NA) or facilitator and the needs assessment committee (NAC). While the needs assessor will generally be an external consultant, the NAC should represent all stakeholders if it is to have credibility in overseeing the needs assessment process. The NAC links the organization with the needs assessor. As tensions may exist between the internal NAC and the external needs assessor as well as among stakeholders, need assessments require extensive stakeholder analysis, as well as political and interpersonal skills. External evaluation consultants would find great value in the discussion on setting up the NAC, but anyone engaging in stakeholder analysis could benefit.

As an external consultant, one task for the needs assessor would be to learn about the organization. The authors recommend a cultural audit – a systematic process based on ethnography to learn the organization's assumptions, common practices, communication channels, and anomalies.

While the above can provide information about the organization as a whole, the needs assessor requires more information about the members of the NAC, if they are to work together successfully. The authors suggest two tactics. One tactic involves surveying the NAC with the purpose of learning about the NAC's perceptions of issues and culture. The second tactic requires that each member of the NAC write a letter to the needs assessor describing their understanding of potential needs.

The central task of a needs assessment is the determination of need. In Altschuld's model, the entire process of the needs assessment has to be documented, visible, systematic, and defensible. Needs differ from solutions. According to the authors, most people conflate needs with solutions, precluding knowing all possible solutions. For example, no one needs computers – computers are a solution to the need for access to technology. Another possible, and cheaper, solution might be dedicated access to computers at a library. This distinction allows for a more thorough examination of possible solutions to the identified need.

Differences exist within both needs and solutions. The authors distinguish three levels of need: Level 1, those of service recipients; Level 2, those of service providers; and Level 3, institutional needs. The NAC should prioritize Level 1 needs. In line with their emphasis on making

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Surfing the Web with Christine K. Thompson

Evaluators do research for a living, yet the world wide web can be an overwhelming place to start. SEA Board Member Christine King Thompson has graciously volunteered to review websites that provide information useful to evaluators Let the reviews begin!

TRASI Foundation Center
http://trasi.foundationcenter.org/

This is an online database of Tools and Resources for Assessing Social Impact (TRASI). TRASI contains a comprehensive listing of 150 approaches to measuring and analyzing social impact for programs and investments. Authored by a range of organizations, including social investors, foundations, NGOs, microfinance institutions, and others seeking social change, these resources range from off-the-shelf tools and concrete methodologies to generalized best practices.

RWJF: Qualitative Research
http://www.qualres.org/

This website is designed for those conducting qualitative research and evaluation in healthcare settings. It describes qualitative research and the common research paradigms, research traditions, methods, analytical approaches, pitfalls and evaluation criteria. It also provides guidelines for reviewing qualitative reports and for designing, analyzing and reporting qualitative research.

Innovation Network: Evaluation Resource Center
http://www.innonet.org/?section_id=62&content_id=142

This site provides a variety of evaluation and research-related resources. Some of the covered topics include logic models, evaluation planning, data collection techniques (surveys, interviews, and focus groups), sample size, confidence intervals, data analysis and reporting, and evaluation capacity building. General evaluation guides are also provided.

NC State University: Multiple Regression
http://faculty.chass.ncsu.edu/garson/PA765/regress.htm

This site provides a variety of information about multiple regression analysis. This is a great resource for someone new to using multiple regression or who has a few questions about it.

Needs Assessment Vol. 2

(continued from page 5)

criteria visible, the authors discuss different levels of solutions (ideal, adequate, minimal, expected, and desired solutions) to proposed areas of need. The selection of the best level of a solution depends upon the context, the available resources, and the organizational motivation. This model provides a much more complex and nuanced understanding of both needs and solutions.

Most discussions of needs assessments focus on the distinction between needs and wants. In this model, the NAC develops a validation process that identifies areas of concern and the values underlying those concerns. The NAC can then examine the concerns and their underlying values to determine if they constitute potentially defensible needs worthy of further analysis and data collection in Phase II. This can also bring to light stakeholder differences in values and areas of concern. This model emphasizes acknowledging and working with contradictory information in order to move forward.

The authors pack a great deal of info into 135 pages. Unfortunately, the index is not terribly useful but this book makes excellent use of formatting to facilitate skimming. There are numerous headings and subheadings with lots of tables and figures. At the end of each chapter, the authors list the highlights of the chapter. This use of formatting makes it both easy to read and to locate particular pieces of information.

Needs Assessment: Analysis and Prioritization (Volume 4)

James W. Altschuld and Jeffrey L. White

Series Editor: James W. Altschuld

Sage: 119 pages

Reviewed by Sean Little

A needs assessment will require a prioritization process if the identified needs exceed the available resources to implement potential solutions, if different stakeholder groups identified different needs, or if the data reveal contradictory evidence. Altschuld and White assert that most needs assessors fail to make this process visible. The key task of this process lies in developing a defensible, visible, systematic and documented process for the prioritization of needs. Three criteria form the basis of this prioritization: importance, feasibility and risk (of both acting and not-acting). Simple needs assessments may not require the use of all three criteria, but the use of additional criteria may help in prioritizing needs.

As needs assessments frequently employ both qualitative and quantitative data, mixed methods researchers or those who want to learn more about mixed methods may find this volume extremely useful. Altschuld's model of needs assessment rests on a quantitative discrepancy between "what should be" and "what is". While this will reveal a discrepancy, it will not reveal the values, assumptions, or perceptions underlying those discrepancies. Only qualitative data can provide that. This volume provides a useful discussion of how to integrate qualitative and quantitative data.

The author describe three methods for this integration: 1. Goal Attainment Scaling, 2. Short Summaries per Source, and 3. A Collated Summary Across Sources. Each of these summary methods has advantages and drawbacks. When combined with the area of concern/value criteria from Phase I, any of these three summary methods can form the basis for a defensible prioritization process.

In *Goal Attainment Scaling*, the needs assessment committee (NAC) develops a common metric, frequently an ordinal scale, to be applied to all sources of data for how well it supports a given need. The NAC has to determine the criteria for the extremes of this scale and examine each source for how well the data support a proposed need/area of concern. Almost invariably, the NAC will require some training before engaging in this process. The data from all sources can then be displayed in a matrix format, allowing for easy comparison, but the loss of context and nuance in this summary method forms a major concern.

A Short Summary per Source involves drafting a summary for each method. This summary addresses the following four categories: method summary, main findings, contradictory findings, and other pertinent information. Teams with high levels of diversity should develop these summaries but the entire NAC should review them to write the final report. The summary should not exceed one-to-two pages. As this summary method retains the most detail and context, it best represents the data but also presents the most difficulty in use.

A Collated Summary Across Sources refers to a table with the needs as rows and the sources as columns. The final column should contain a statement of commonalities and agreements across sources. If there is contradictory date or data specific to sub-populations, it can be entered in immediately adjacent rows or columns. This may form the most labor intensive of all proposed data reduction techniques. While easier to interpret than short summaries per source, it still forms a very complex document.

The most difficult prioritization process occurs when differences exist between stakeholders. This becomes more likely if the NAC has utilized only one criterion, such as importance, for prioritization. One possibility would be to determine priorities for each group separately and then compare them. Groups could then discuss why these between-group differences exist. Another possible resolution would be to select a need that is high priority for both groups but not either's number one priority. If the NAC had not utilized all three criteria (importance, feasibility, and risk) in the original prioritization, the NAC could employ other criteria.

The emphasis on prioritization in Alstchuld's model makes visible the most potentially divisive issue of a needs assessment. When the NAC documents these technical aspects, its recommendations become defensible in the "turf" and budget battles that inevitably follow the final report. For that this volume is invaluable.

SEA

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We're on the web!
www.southeastevaluation.com

The **Southeast Evaluation Association** (SEA) is a regional affiliate 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.

Suggestions

SEA welcomes all ideas for topics for future workshops, brown bag lunches, newsletter articles, and conference sessions. Please contact Bernadette Howard (seacoordinator@southeastevaluation.com) with your ideas!

Thank You

Many thanks for getting this newsletter out are due to the diligent work of the Newsletter Production Crew:
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