Pre-conference workshop program

Monday 8 to Tuesday 9 September 2014

Charles Darwin University
Ellengowan Drive, Casuarina, Darwin

NOTE: The AES cannot guarantee that each workshop will go ahead as scheduled. If a workshop is cancelled, you will be offered a place in another workshop, or a refund.

This document is to be read with terms and conditions outlined on the conference website.

Monday 8 September 2014

8:35am	WELCOME TO COUNTRY		
9am – 12:30 pm	**Real-Time Evaluation, Theory and Practice** John Owen **HALF DAY** **INTERMEDIATE/** **BEGINNER**	**'Evaluation by us, for us': What is required of AES to strengthen, advance and support Indigenous Evaluation?** Amohia Boulton **FULL DAY** **INDIGENOUS ONLY** **(NO CHARGE)**	**Quantifying the impact of a non-randomised intervention: Statistical methods for non-statisticians** Jim Gaetjens **FULL DAY** **INTERMEDIATE**
12:30 pm	LUNCH		
1:30 – 5pm	**Quality in Qualitative Research and Evaluation - what do we need to know?** Karen Kellard **HALF DAY** **INTERMEDIATE/** **BEGINNER**	Amohia Boulton continued	Jim Gaetjens continued
5pm	WORKSHOPS END		

Tuesday 9 September 2014

8:35am	WELCOME TO COUNTRY				
9am – 12:30 pm	**Data visualisation in evaluation** Ellen Vasiliauskas **FULL DAY BEGINNER**			**First, Do No Further Harm** Gill Westhorp **FULL DAY INTERMEDIATE/ ADVANCED**	**Unleashing the power of Story in evaluation: Performance stories, episode studies and the most significant change technique** Jess Dart; Lee-Anne Molony **FULL DAY ALL LEVELS**
12:30 pm	LUNCH				
1:30 – 5pm	Ellen Vasiliauskas continued	**An Introduction to the Essential Competencies for Program Evaluators** Jean King **HALF DAY INTERMEDIATE**	**Designing and Embedding Strategic Learning and Performing Systems for Organisations, Departments, Programmes and Projects** Annalize Struwig; Kate Averill **HALF DAY INTERMEDIATE**	Gill Westhorp continued	Jess Dart; Lee-Anne Molony continued
5pm	WORKSHOPS END				

MONDAY 8 SEPTEMBER: WORKSHOP DESCRIPTIONS

Real-Time Evaluation, Theory and Practice HALF-DAY (am)

*presented by **John Owen**; Centre for Program Evaluation; The University of Melbourne*

The purpose of this workshop is to equip participants to undertake evaluation work that requires the use of real time or rapid response techniques. The objectives are enable participants to:

- understand the principles underlying the real-time evaluation paradigm
- practise the application of real-time methods in a simulated situation
- consider ways in which they could transfer their understandings to their own practice.

The workshop is based on a translation of recent research underlying real-time evaluation practice, and addresses skills not typically taught in evaluation training programs.
These include; the ability to work in uncertain, ambiguous and complex situations, use of high level negotiation skills, understanding the need a for the pragmatic; flexibility in order to respond quickly to requests, and use of innovative communication and listening skills.

The workshop is targeted at participants who have some evaluation experience and wish to extend their evaluation repertoire. The workshop will be based on a simulated case example, and participants will work in groups on a set of scenarios related to the case. In addition to information acquired during the workshop, participant will be provided with take-away workshop notes and readings to consolidate designed to consolidate their knowledge.

"Evaluation by us, for us": What is required of AES to strengthen, advance and support Indigenous Evaluation? *A workshop for Indigenous participants only*

*presented by **Amohia Boulton**; Whakauae Research for Māori Health and Development; New Zealand*

The AES Constitution currently makes no mention of the unique place Indigenous peoples have in the make-up of societies in and around the Pacific, including Australia and New Zealand. Indigenous evaluation, as the ontological and epistemological expression of the lived reality of Indigenous peoples, as theory and as practice, is however, increasingly being recognised as a legitimate discipline in its own right. Furthermore, Indigenous evaluation – evaluation undertaken by Indigenous peoples for Indigenous peoples – is being demanded by Indigenous communities who are often in receipt of services and programmes developed without their input or consultation. Indigenous evaluation is regarded by these communities therefore, as an emancipatory and transformative force.

Despite the constitutional "silence" on the issue of Indigenous peoples, the AES Board is keen to advance and support the field of Indigenous evaluation as appropriate, and seeks guidance on how to do this from Indigenous participants at the 2014 conference. In this facilitated workshop for Indigenous participants only, workshop attendees will be asked to identify the key issues in Indigenous Evaluation in our wider Pacific region; how the AES can best support the growth and advancement of Indigenous Evaluation in our region; and how the AES can best support the growth and development of Indigenous members of the Society.

NOTE: *This workshop is for Indigenous participants only. There is no charge. Please register your interest in securing a place by emailing* conference@aes.asn.au *with the subject line "Expression of interest in attending the "Evaluation by us, for us" workshop."*

Quantifying the impact of a non-randomised intervention: Statistical methods for non-statisticians

*presented by **Jim Gaetjens**; WorkCover SA; Adelaide, South Australia*

This workshop is designed for evaluators with reasonably good quantitative skills (perhaps a "quantitative bent") but who certainly are not statisticians. It introduces a methodology which is a powerful tool for impact evaluation in situations where

1. large amounts of data are available for both participants and non-participants in a program;
2. the intervention is clearly defined as received or not received (i.e. ignores dosage effects); and
3. the intervention was not randomly assigned.

Although good impact evaluation designs will yield useful information, there may exist data which require solid quantitative methods to exploit their full potential. Due to budget constraints or other reasons, employing a statistician may not be an option – or even if it is, the evaluator may prefer to explore the data themselves at least initially.

The workshop provides hands-on training to better equip the non-statistician in this task. It explains how to produce "propensity scores" to reduce the differences between intervention and non-intervention groups before comparing their outcomes. Conceptually the method seeks to match the two groups on characteristics (such as age, gender, occupation etc.); however propensity scores have definite advantages over other matching techniques, especially when there are many non-intervention records and many matching characteristics available. A quick literature review may lead to the conclusion that the methodology is exclusively the domain of statisticians. However, the truth is that many of the usual statistical difficulties do not apply, and the non-statistician is able to produce meaningful and credible results.

Participation in the workshop requires a laptop (or the willingness look over someone's shoulder) with Excel installed. Prior to the workshop a data file will be provided for download, and instructions given to set up Excel with the required "Add-in". Participants should have a basic knowledge of Excel, and a basic knowledge of quantitative methods, but no other pre-requisites are required.

Quality in Qualitative Research and Evaluation – what do we need to know? HALF DAY (pm)

*presented by **Karen Kellard**; The Social Research Centre, Melbourne, Australia*

The main aim is to bring issues of 'quality' in qualitative evaluation to the forefront of debate and discussion. The notion of 'quality' in qualitative research methods used in evaluation is at best vague. Researchers and evaluators have long debated the notion of quality – how it is defined and measured – and have demonstrated a shared commitment to rigour, robustness and relevance but without a solid agreement on what this means, and indeed to what extent such standards or measures can be formalised given the nature of qualitative enquiry.

This workshop will focus on:

- Four central principles of qualitative research in evaluation (that it adds new knowledge or evidence, that the chosen research design is defensible, that the conduct is rigorous and that the findings are credible and clearly linked to the data)
- Quality at different stages of the qualitative research evaluation process (design, sampling, recruitment, fieldwork, analysis and reporting) – what kind of 'indicators' of quality could we be looking at, how and why? How does this differ in face-to-face, telephone and online qualitative settings?
- Quality elements that run throughout the research and evaluation process (relating to, for example, research ethics, neutrality, reflexivity, skills and so forth).

The intended outcome is to prompt further thinking, dialogue and debate about how we define and judge quality in qualitative approaches and to begin to think about the acceptability of frameworks for assessment in this area. At an individual level, it will also encourage self-reflective practice to continue to raise the standard of qualitative practice, and to build knowledge, capacity and expertise.

The intended target group is those who use qualitative techniques in evaluation, those who commission qualitative evaluations and those who use evidence from qualitative evaluations. Some knowledge of qualitative methodologies is therefore assumed as well as (ideally) some qualitative practice experience.

TUESDAY 9 SEPTEMBER: WORKSHOP DESCRIPTIONS

Data visualisation in evaluation

*presented by **Ellen Vasiliauskas;** d-sipher, Sunshine Coast, Queensland, Australia*

Ellen is an experienced evaluator, having project managed, designed and undertaken major evaluation and market research projects for over 20 years for large and small government agencies as well as not-for-profits, and the private sector. Her particular interest is in data visualisation and logic modelling of complex projects to assist in applying evaluation learnings to strategic and policy contexts. She holds a Master in Neuro Linguistic Programming and is a Master Business and Personal Coach.

In this workshop, participants will gain an overview of the meaning of data visualisation as it applies to evaluation and current trends. They will learn techniques for applying data visualisation to reporting and presentation of results in evaluation. The benefits of these techniques are many – from more effective communication of results and clarity on the meaning of large amounts of complex data to better engagement of decision makers and recall of information.

However, not everything that looks good communicates meaning. This workshop will guide participants through the good and bad of data visualisation and applications to quantitative and qualitative data and reporting. Participants will gain knowledge in various methods and processes of data visualisation in quantitative and qualitative applications. Techniques will include modelling, developing visual maps, the use of metaphor and storytelling, use of colour to convey meaning, graphical presentation, mind maps, storyboards and so forth.

The workshop will explore:
- Definitions of data visualisation as it applies to evaluation.
- The case for data visualisation and the needs of stakeholders.
- How audiences absorb data and information.
- How does data become clear, intuitive and even fun?
- What makes for clear data visualisation and what makes things murky?
- Strategies for enhancing visual presentation and reporting.
- Rules for charts and simple quantitative presentation formats.
- Options for visualising qualitative data.

The aims of this workshop are:
- to understand broad directions and trends in data visualisation
- to understand the meaning of data visualisation as it applies to evaluation
- to understand the relevance of data visualisation and needs of evaluation audiences and stakeholders
- to understand the difference between good and bad data visualisation
- to understand fundamental rules for charts and simple quantitative presentation formats
- to explore options for visualising qualitative data
- to be aware of the resources available in data visualisation.

Learning strategies will include individual and group exercises as well as whole group Q&A. Participants are invited to bring their quantitative or qualitative data visualisations to discuss. Examples will be selected and the techniques learnt applied in group exercises. Target group and prerequisites including the level of experience the workshop is pitched at Beginners and those new to data visualisation.

This workshop will enhance participants' capability to more effectively communicate evaluation findings and engage with their stakeholders.

First, do no further harm

*presented by **Gill Westhorp;** Director of Community Matters Pty Ltd*

Community Matters is a consultancy firm specialising in realist research and evaluation methodologies. Gill is also a University Fellow at CDU and an Associate in the School of Global, Urban and Social Studies at RMIT University.

One of the contributions of realist methodologies in evaluation has been highlighting that programs work differently for different people. Net program impacts are by definition an average – implying that for some people, the results are less positive or indeed negative. Negative impacts are sometimes concentrated amongst the most disadvantaged. This is a particular dilemma in social services programs which seek to improve outcomes for disadvantaged groups.

The purpose of the workshop is to begin to address a vexed question: how can evaluation assist policies and programs to avoid doing harm to disadvantaged groups?

In the first session, some of the evidence that programs can and do 'do harm' will be presented, and principles of complexity theory and realist evaluation will be introduced. The second session will sketch an original theoretical framework for understanding how and why social programs can make things worse for the disadvantaged. Workshop participants will be asked to use this framework to sketch how a policy or program they work with might cause further harm. Principles for programs to avoid doing further harm will then be proposed and participants will be asked to sketch how their policy or program might be modified to avoid doing further harm. In the third session, a stakeholder simulation and a rotating panel of experts will be used to develop ideas for evaluation approaches and roles for evaluators that might be used to assess whether programs are doing further harm, to whom, and how programs might be modified to avoid harm and build benefits. In the final session, the implications for three steps in evaluation design (evaluation questions, program theory and data) will be examined, using activities grounded in the participants' own policies or programs.

This workshop is suitable for intermediate and advanced evaluation practitioners and for commissioners with a solid understanding of evaluation practice.

Unleashing the power of Story in evaluation: Performance stories, episode studies and the most significant change technique

*presented by **Dr Jess Dart**; Clear Horizon Consulting and **Lee-Anne Molony**; Clear Horizon Consulting; Melbourne, Australia*

A good story defines relationships, a sequence of events, and cause and effect - and those elements are likely to be remembered as a complex whole. If stories about the impact of a program can infiltrate the collective memory of an organisation or community, the members will gain and retain a more deeply shared understanding of what is being achieved. This not only helps communicate achievements but also creates a common base for dialogue about what is desirable in terms of expected and unexpected impact.

This workshop introduces and explores three contemporary approaches to using story in evaluation (Performance stories, episode studies and the most significant change technique). Each technique works at very different scales: from the story of a whole program; the story of a policy change and the story of an individual beneficiary. Regardless of scale, all techniques harness the structure and depth that story offers and can breathe life into a mixed-method evaluation process.

Story techniques can form a key part of an effective monitoring and evaluation plan, or an evaluation study. They can draw out changes that are intangible and emergent, and work particularly well in complex programs. They also complement more indicator-based approaches to monitoring.

Using participatory techniques, this full day workshop is aimed at beginner to intermediate participants. It provides an overview of each method, examples of how they have been used and explores their differences and the contexts in which they are best applied.

An Introduction to the Essential Competencies for Program Evaluators HALF-DAY (pm)

*presented by **Jean King**; Distinguished Teaching Professor, Department of Organizational Leadership, Policy and Development, University of Minnesota*

This workshop is designed to teach participants the Essential Competencies for Program Evaluators, a set of knowledge, skills, and attitudes in six categories. The session will begin with the analysis of program evaluation vignettes representing diverse areas of practice to show both the common competencies across settings and those unique to specific contents or contexts. Following a brief history of how the competencies were developed, the session will then examine the

competencies in all six categories: professional practice, systematic inquiry, situational analysis, project management, reflective practice, and interpersonal skills.

This discussion, which builds on the continuum of interpersonal evaluation practice, will ground participants in the competencies' content and allow people to ask questions as they think about their own evaluation practice. After a short break, participants will develop concept maps to explore how the competencies make sense in their roles or content areas. Comparative discussion will further illuminate the competencies, and then participants will complete a self-assessment tool and discuss how to set priorities and action steps for professional development. Most of the session will consist of interactive exercises with just enough lecture to frame the discussion.

You will learn:
- The Essential Competencies for Program Evaluators
- How to assess your own competencies to identify knowledge and skill gaps
- How to improve your practice through strength-based reflection

Designing and Embedding Strategic Learning and Performing Systems for Organisations, Departments, Programmes and Projects HALF-DAY (pm)

presented by **Annalize Struwig**; *Evaluation Consult and* **Kate Averill**; *Evaluation Consult; Wellington, New Zealand*

This workshop focuses on key principles and practical tools for designing and embedding strategic learning and performing systems within organisations, programmes and projects. This systematic, innovative approach utilises transformative evaluative thinking to enhance connections between planning, implementation and management processes. The value of linking strategy and evaluative techniques within organisations, programmes and projects is demonstrated using practical examples.

Participants will gain knowledge and understanding of how to design and embed learning and performing systems within organisations, programmes and projects using a combination of systems mapping, integrated evaluative design and management with organisational psychology. The workshop focuses on the use of practical tools for designing integrated learning and performing systems including organisational culture, competencies and capability pathways to extend evaluative design and capability within organisations, programmes and projects. The half day workshop will be interactive and is aimed at managers, programme personnel and evaluation practitioners. The implications of the transformative evaluative practices being mainstreamed and the emerging role of specialist evaluation practitioners will be discussed.