

**“Optimizing the Practice of Evaluation”**

**2010 Annual Conference October 4 – 5, 2010**

**The Old Mill Inn & Spa • Toronto • Ontario**

**21 Old Mill Road**

**Conference Program - Day 1**

**Monday October 4, 2010**

Thank you to  
**Johnston Research Inc.**  
for supporting our conference!



8:00 – 9:15 am	<b>Registration and Breakfast</b> <i>(Brulé A &amp; B)</i>
9:15 – 9:30 am	<b>Welcome Remarks by Conference Co-Chairs:</b> <i>(Brulé A &amp; B)</i> <ul style="list-style-type: none"><li>◆ <b>Shirley Von Sychowski</b>, CES-ON Conference Co-Chair</li><li>◆ <b>Dawn Campbell-Borland</b>, CES-ON Conference Co-Chair</li></ul>
9:30 – 10:30 am	<b>Keynote Address:</b> <i>(Brulé A &amp; B)</i> <ul style="list-style-type: none"><li>◆ <b>Dr. Cheryl Poth</b>, Assistant Professor, Centre for Research in Applied Measurement and Evaluation, University of Alberta</li></ul> <p><i>Tapping into Evaluation's Potential for Supporting Organizational Development and Learning</i></p>
10:30 – 10:45 am	<b>Q &amp; A / Discussion</b>
10:45 – 11:15 am	<b>Nutrition Break &amp; Networking</b> <i>(Brulé A &amp; B)</i>
11:15 – 12:45 pm	<b>Concurrent Sessions A, B, C &amp; D</b> (refer to attached for session information)
12:45 – 1:45 pm	<b>Lunch</b> <i>(Brulé A &amp; B)</i>
1:45 – 3:15 pm	<b>Concurrent Sessions E, F, G, &amp; H</b> (refer to attached for session information)
3:15 – 4:30 pm	<b>Networking &amp; Awards Wine-tasting Event</b> <i>(Brulé A &amp; B)</i> <ul style="list-style-type: none"><li>◆ Recognizing <b>Dr. Paul Favaro</b> and <b>Dr. Christine Frank</b></li></ul>
4:30 – 4:45 pm	<b>Conference Evaluation / Book Draw</b>
4:45 – 5:45 pm	<b>CES-ON Annual General Meeting</b> <i>(Brulé A &amp; B)</i>

Thank you to  
**R.A. Malatest & Associates Ltd.**  
for supporting our conference!



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**Conference Program - Day 2**

**Tuesday October 5, 2010**

*Thank you to University of Victoria  
School of Public Administration  
for supporting our conference!*



**University  
of Victoria**  
British Columbia • Canada

8:30 am

**Registration**

8:45 – 9:30 am

**Thematic Breakfast Roundtables** *(Brulé A & B)*

9:30 – 10:30 am

**Panel Discussion** *(Brulé A & B)*

***Ready to be a Credentialed Evaluator (CE)?***

♦ **To be Announced...panel discussants**

Moderator: **Dr. Keiko Kuji-Shikatani**, *Vice-President, Professional Designation Program*

10:30 – 11:00 am

**Q & A / Discussion**

11:00 – 11:15 am

**Nutrition Break & Networking** *(Brulé A & B)*

11:15 – 1:15 pm

**Concurrent Workshops 1, 2, 3, & 4** (refer to attached for session information)

1:15 – 2:15 pm

**Lunch** *(Brulé A & B)*

2:15 – 4:15 pm

**Concurrent Workshops 1, 2, 3, & 4 Continued**

4:15 – 4:45 pm

**Closing Remarks  
Conference Evaluation & Book Draw**

*Thank you to  
Cathexis Consulting Inc.  
for supporting our conference!*



## *“Optimizing the Practice of Evaluation”*

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### **Biography of Keynote Speaker - Dr. Cheryl Poth**

**Assistant Professor, Centre for Research in Applied Measurement and Evaluation  
University of Alberta**

Cheryl Poth is an assistant professor in the Department of Educational Psychology at the University of Alberta. In this role, her responsibilities include teaching graduate courses in program evaluation and mixed methods research, and supervising graduate students. Dr. Poth is an active program evaluator having worked over a decade with a variety of organizational settings including educational initiatives in the Faculty of Health Sciences, Early Childhood Education, K-12, social programs in provincial ministries and internationally with non-governmental organizations in Guyana and Uganda. Before returning to graduate studies first in the United States and then at Queen's University, Cheryl spent 5 years teaching internationally and served as an administrator of an overseas program.

Dr. Poth's specific research interests are in the area of evaluation use and advancements in the field of evaluation such as developmental evaluation. In particular exploring how evaluations can be negotiated and conducted to respond to an organization's emerging needs. Organizational theories informed by complexity science provide an innovative framework in which to anchor this research. She brings to her work expertise in mixed methods as well as a variety of qualitative and quantitative research methods.

She is a member of both the Canadian and American Evaluation Associations and is a regular contributor to the annual conferences. She was the student chair for the joint CES/AEA conference in 2005, a member of the credentialing subcommittee during the professional designation process, a professional development workshop provider for the Alberta Chapter, and a member of the organizing committee of the 2011 CES conference in Edmonton. She is also a member of several professional organizations including Canadian Society for Studies in Education (CSSE), National Council on Measurement in Education (NCME), a member scholar of the International Institute for Qualitative Methodology (IIQM), and the Ontario College of Teachers (OCT).



<p><b>Session A</b> <b>Dealing with the Challenges of Evaluation</b> <i>(Brulé A)</i></p>	<p><b>Session B</b> <b>Measuring the Right Things</b> <i>(Brulé B)</i></p>	<p><b>Session C</b> <b>Building Capacity</b> <i>(Mill Room)</i></p>	<p><b>Session D</b> <b>CASE STUDIES: Using Evaluations</b> <i>(Victoria Room)</i></p>
<p><b>Adequate Evidence in Program Evaluations</b> <i>HT Wilson</i> York University</p> <p>This session will clarify what we mean by ‘evidence’ when we conduct evaluation activities. We should be conscious of cross cultural sensitivity, ethical integrity and reflexivity based on adherence to the postulate of adequacy throughout the process. To demonstrate that adherence to the concept of adequacy is often required, to meet realistic and necessary conditions for ‘evidence based’ research in evaluation.</p> <p><b>Evolving Practices of Community Impact: Implications for Evaluation</b> <i>Charles Fiki</i> Tripod Consulting Inc.</p> <p>Community Impact has recently gained currency in the evaluation field. It emerged as a language of accountability and some practices are constituted around it, rendering it more as an outcome evaluation framework. What are the differing notions of community impact? What are the practices being constituted around it as an emerging evaluation culture? What are the implications for evaluation? These implications are highlighted in light throughout the presentation.</p> <p><b>Why Everyone Needs to Get Engaged</b> <i>Rob Assels &amp; Wilson West</i> R.A. Malatest &amp; Associates Office of the Fairness Commissioner</p> <p>This session will highlight methodological issues from a study on the experiences of internationally trained professionals when trying to get licensed in Ontario. The importance of engaging these professionals in gathering the data, as well as the licensing bodies when disseminating the results, will be underscored.</p>	<p><b>What does Performance Measurement Mean to Different Jurisdictions?</b> <i>Mehrnoosh Aghdasi</i> Ministry of Community and Social Services - Ontario</p> <p>Knowing what works for others has helped many in their journey for development of performance measurement/management systems. This session will share findings from Literature Review/ Jurisdictional Scan on performance measures. Questions to be addressed: ► What are the core concepts and approaches to performance measurement? ► What are other jurisdictions’ experience in implementing PM systems?</p> <p><b>Using a Fidelity Index to Increase Program Attribution in Impact Evaluation Studies</b> <i>Donna Smith-Moncricieffe</i> Public Safety Canada</p> <p>This presentation demonstrates the development and use of a quantifiable fidelity index in impact evaluation studies. It will provide an overview of the importance of quantifying fidelity indices, illustrate its utility in being able to ensure program sites are implementing the key elements as planned, and outline the benefits and utility of the quantifiable fidelity index.</p> <p><b>Measuring Impacts in Science-based Programs</b> <i>Joanne Johnson</i> <i>Ryan Lotan</i> PricewaterhouseCoopers</p> <p>We will present some of the key concerns of our Government clients and the challenges they are facing in measuring the impacts of science-based research programs. We will discuss the advantages and disadvantages of performance measurement methodologies, and associated effectiveness ratings for government departments in Canada, the US and Australia.</p>	<p><b>Introducing CAPTURE: An Evaluation Capacity Building System</b> <i>Dayna Albert</i> Simon Fraser University</p> <p>The CAPTURE Project aims to revolutionize evaluation capacity-building through development of a web-based platform to support the collection, use and sharing of practice-based evidence. A system’s perspective integrates program planning, evaluation and dissemination activities, and channels practitioners’ tacit knowledge to facilitate ever more effective chronic disease prevention initiatives.</p> <p><b>Building Organizational Evaluation Capacity through TEIP Master Trainer Workshops</b> <i>Dayna Albert</i> Ontario Public Health Ass’n</p> <p>Training initiatives must look beyond individual skill development to address the need for organizational change to facilitate and sustain evaluation practice. The TEIP Master Trainer program addresses development of organizational supports and local champions for evidence-informed practice.</p> <p><b>Evaluation of Services in a Blindness Organization: Continuous Quality Improvement from the Inside</b> <i>Biljana Zuvela</i> <i>Dr. Deborah Gold</i> CNIB</p> <p>This session will provide a synopsis of the quality improvement and evaluation of services journey experienced by CNIB over the past five years. We will focus on lessons learned from our attempts to increase the organization’s capacity to evaluate its services and to cultivate a spirit of continuous learning.</p>	<p><b>Evidence-Informed Decision-Making: Making the Most of Mandatory Tools</b> <i>Sandra Cuning</i> <i>Jane Rounthwaite</i> Kinark Child &amp; Family Services</p> <p>Kinark Child and Family Services has implemented an agency-wide change process, involving the “reinstallation” of provincially mandated tools. The Brief Child and Family Phone Interview and the Child and Adolescent Functional Assessment Scale are being utilized in focused, program-specific ways that have facilitated and increased their use in clinical and program management decision-making processes.</p> <p><b>Prepared for the World: Response to the G8 Summit in Muskoka</b> <i>Deborah Hardwick</i> <i>Carolyn Pigeau</i> Simcoe Muskoka Health Unit</p> <p>This presentation will demonstrate the use of multiple methods to evaluate the planning and response of a public health unit to the potential for a public health emergency during the G8 Summit in Muskoka, June 2010.</p> <p><b>A Workplace Environmental Concerns Program: Assessing the Evaluability of ECO Initiatives</b> <i>Marie Traynor</i> KFL&amp;A Public Health</p> <p>Evaluation readiness of a public health agency workplace environmental stewardship program was determined using Wholey’s Evaluability Assessment. Methods included an evaluation question matrix, a literature review, stakeholder meetings and an on-line survey. Stakeholders affirmed program objectives, a logic model, potential indicators, the prioritization of evaluation focus and its utilization plan.</p>



<p><b>Session E</b></p> <p><b>Making the Most with Limited Resources</b></p> <p><i>(Brulé A)</i></p>	<p><b>Session F</b></p> <p><b>Measuring Complex Initiatives</b></p> <p><i>(Brulé B)</i></p>	<p><b>Session G</b></p> <p><b>Actionable Evaluation to be Used for Decision-Making</b></p> <p><i>(Mill Room)</i></p>	<p><b>Session H</b></p> <p><b>CASE STUDIES: Evaluations Involving Specific Populations</b></p> <p><i>(Victoria Room)</i></p>
<p><b>Best Practices in Cost Cutting</b></p> <p><b>Rob Assels</b> R.A. Malatest &amp; Associates</p> <p>This session is intended for evaluation buyers and is provided by an evaluation seller. Rob Assels will discuss both good and bad methods available to evaluators interested in cutting costs. Among the topics discussed will be RFP guidelines, online surveys, teleconference focus groups, incentives and the use of secondary source data. The discussion will focus on how best to work with your supplier to optimize your evaluation budget.</p> <p><b>Pre- and Post-Triangulation Measurement: Considerations for Program Evaluation</b></p> <p><b>Nicole Obeid</b> <b>John Lyons</b> Children’s Hospital of Eastern ON</p> <p>This study will investigate triangulation strategies applicable to program evaluation, and will suggest a new approach to triangulation. This type of triangulation incorporates a measurement strategy that allows for post-measurement triangulation to occur. Use of such strategies in program evaluation may decrease costs, enhance communication, and alleviate evaluation complexities.</p> <p><b>Evaluating E2: The new Treasury Board Directive</b></p> <p><b>Joanne Johnson</b> <b>Michael Smaglinski</b> PricewaterhouseCoopers</p> <p>The Treasury Board of Canada’s policy on Evaluation requires Departments to evaluate all program spending in a rolling five year cycle, significantly increasing capacity demands on Evaluation units. This presentation will focus on promoting a discussion on the challenges associated with meeting these requirements and provide innovate risk-based methods and tools to help in meeting those challenges.</p>	<p><b>Basic Efficiency Resource: A Framework for Measuring the Relative Performance of Multi-Unit Programs</b></p> <p><b>Brian Cugelman</b> AlterSpark</p> <p>This presentation provides an overview of the Basic Efficiency Resource (BER) model. The BER model can aid impact evaluations comprising numerous sub-units. It is based on quadrant analysis and <i>social return on investment</i>, where output is compared to input, providing a relative perspective on performance.</p> <p><b>Apples to Apples: Finding Core Metrics in a Complex Initiative</b></p> <p><b>Justin Mathena</b> <b>Blair Dimock</b> Rotman School of Management Ontario Trillium Foundation</p> <p>This presentation will review both the process and outcomes of developing a holistic evaluation framework for the Ontario Trillium Foundation’s Future Fund. The use of analytical techniques such as causal maps, mind mapping, and comparative analysis will be discussed as elements of discovering relationships between activities and outcomes.</p> <p><b>Measuring the Impact of Health Promotion Capacity Building Activities in Ontario:</b></p> <p><b>Brian Hyndman</b> <b>Carly Heung</b> Ontario Agency for Health Protection and Promotion University of Waterloo</p> <p>This presentation focuses on the development of a framework for evaluating the capacity building activities of health promotion resource centres. The framework identifies proposed indicators of health promotion capacity at the individual, organizational and system levels.</p>	<p><b>Program Evaluation as a Social Epidemic: The Spread of Evaluative Thinking and Practice</b></p> <p><b>Stephanie Sutherland</b> University of Ottawa</p> <p>Program evaluation in medicine has reached its <i>tipping point</i> whereby the momentum in demand has spread in global proportions. This paper will elaborate on the importance and benefits of shifting evaluative thinking from meeting accountability demands to a focus on organizational learning.</p> <p><b>Mainstreaming Evaluation through BARs and AARs</b></p> <p><b>Dan Wilson</b> Ontario Trillium Foundation</p> <p>A year ago, OTF made the decision to experiment with an “Emergent Learning” approach with two innovative strategic projects of the Foundation. This session will provide an overview of the “Emergent Learning” method as developed by Signet Research and how it has been applied in two case studies.</p> <p><b>What you Don’t Know CAN Hurt You: Spreading Results for Action</b></p> <p><b>Gloria Kay</b> <b>Courtney Bean</b> VHA Home HealthCare</p> <p>Fresh ideas were brought to VHA Home HealthCare with the merger of a new Rehabilitation Division. Their focus on performance targets for a few years prior to joining VHA led to highly successful results. Adoption of a number of effective strategies and how they bolstered a culture of accountability will be described.</p>	<p><b>Uptake of Evidence-based Practice: Staff Experience Across EBPs</b></p> <p><b>Lindsay Muir</b> <b>Sandra Cuning</b> Kinark Child &amp; Family Services</p> <p>To improve the efficacy and efficiency of clinical services, Kinark Child and Family Services has implemented an agency-wide change process. A key factor of this process was the development of the Staff Experience Questionnaire, assessing aspects of EBP adoption. Questionnaire data is now being used to improve implementation of EBP’s across the agency, as well as inform implementation teams of EBP uptake.</p> <p><b>Evaluation of a Youth Gang Prevention and Intervention Pilot Project</b></p> <p><b>Margaret Gassanov</b> <b>Scot Wortley</b> University of Toronto</p> <p>This session describes the evaluation design and implementation of a youth gang prevention/ intervention pilot project in Toronto. The study follows a pre-/post-test–experimental group/control group design and documents individual outcomes, community outcomes, and process outputs using a variety of research methodologies.</p> <p><b>Evaluations Involving Transient Populations</b></p> <p><b>Rob Assels</b> <b>Geoff Beere</b> R.A. Malatest &amp; Associates Living Rock Ministries</p> <p>This presentation will showcase the difficulties faced by both evaluators and program managers in completing process and outcome evaluations with transient populations. It will provide a set of promising practices that evaluators can consider when planning their research.</p>



<b>Workshop 1</b> (Brulé A)	<b>Workshop 2</b> (Brulé B)	<b>Workshop 3</b> (Mill Room)	<b>Workshops 4 &amp; 5</b> (Victoria Room)
<p><b>Andrea L.K. Johnston</b> Johnston Research Inc.</p> <p><b>Part A</b> <b>Waawiyeyaa (Circular) Evaluation Tool Certification</b></p> <p>Developed by Johnston Research Inc., this holistic evaluation tool was created for program providers. It's a self-evaluation tool allowing programs to document both meaningful process and outcomes over time. It's also a learning tool that promotes growth and self-development among program participants. By applying the tool at various program-milestones, a full picture can be documented of the personal journeys of the participants in a systematic manner. We will review the manual, see the 20-minute video, complete the exercise and incorporate our stories into an evaluation report. You will take home your story, a copy of the DVD and manual, and a certification in the use of the Tool. <b>Level: Intermediate</b></p> <p><b>Part B</b> <b>Case Study's that Work With (not without) Communities</b></p> <p>Case Study's must respect local protocols and personal touch, utilizing a non-burdening communication strategy, operating within the boundaries of providing ownership, control, access, and possession. The case study approach must honour local needs and ensure site-visitors and interviewers have the heritage and cultural knowledge and can provide local language capabilities. The methodology requires suitability assessment grids, utilization of national data sets, data collection matrices, triangulation of sources, and research evidence matrices. Finally, a methodological innovation will improve data knowledge, such as using photovoice, graphic and dynamic interviewing techniques, sharing circles and elder facilitated sessions, and multiple options for providing input and opinions. <b>Level: Intermediate</b></p>	<p><b>Utilization-Focused Writing</b></p> <p><b>Rochelle Zorzi</b> Cathexis Consulting Inc.</p> <p>Are you a good writer? Want to become even better? Want your reports to jump off the shelf and into action? Then join us! This hands-on workshop provides a set of tools that you can use to make every report a springboard for action.</p> <p>After participating in this workshop, participants will take a more conscious, deliberate approach to their writing, so that their reports are more likely to result in action. Specifically, participants will:</p> <ul style="list-style-type: none"> <li>▶ Have a clearer sense of what they are trying to achieve.</li> <li>▶ Have a better understanding of their audience.</li> <li>▶ Select writing strategies that are more likely to achieve their goals.</li> </ul> <p>The following <i>Competencies for Canadian Evaluators</i> will be addressed:</p> <ul style="list-style-type: none"> <li>• <u>Competency 3.5</u>: Serves the information needs of intended users</li> <li>• <u>Competency 5.1</u>: Uses written communication skills and technologies</li> </ul> <p>This will be a hands-on workshop, including large group discussion, paired activities, and individual activities.</p> <p>Participants will consider a report or other communication that they have written or are about to write. With guidance from the facilitator, they will analyze a target audience for the report, identify key messages they want to communicate, and select strategies that will help them convey their messages. <b>Level: Intermediate</b></p>	<p><b>Internet Research Methods for Impact Evaluations</b></p> <p><b>Brian Cugelman</b> AlterSpark</p> <p>This interactive workshop aims to provide participants with a new perspective on how Internet research methods, commonly used in the social sciences, can enhance traditional evaluation approaches.</p> <p>This workshop will comprise presentations, structured discussions, breakout group exercises, and open question time. It will focus on online indicators, measurement techniques, data sources, and how to integrate online evidence into impact evaluations. These topics will be addressed within the context of several cases studies that will draw from evaluations of Oxfam GB's global climate change campaign, the United Nations Millennium Campaign, and examples of institutional publication evaluations, coalition website networks, time-series news/web trends, and influence within online debates.</p> <p>The final presentation will be a web impact assessment of CES' website in comparison with other evaluation societies. This will be used to initiate discussions on online measurement applications to evaluation.</p> <p>Issues will be presented at a conceptual level, with the presentation occasionally looking "under the hood" to explain the data and tools used for these analyses. <b>Level: Intermediate/advanced</b></p>	<p><b>Priority Sort Method: Mini Skill-Building Workshop</b></p> <p><b>Melissa McGuire</b> <b>Kathryn Parker</b> <b>Adina Jacobson</b> Cathexis Consulting Inc. Hospital for Sick Children</p> <p>Help! We need to choose 10 indicators from a list of 50 – but which 10? Introducing a quick, participatory &amp; (relatively) painless process for setting evaluation priorities.</p> <p>We will introduce a hands-on Priority Sort process that is structured, time efficient, and engaging for all participants. This method will be a valuable addition to any evaluator's toolkit. <b>Level: Any</b></p> <p><b>New Ways of Thinking About Performance Measurement</b></p> <p><b>Dr. Paul Favaro</b> Peel District School Board</p> <p>When done right, performance measurement (PM) has an enormously positive and transformational impact on our organizations and public policies. Measurement is fundamental to high performance and improvement. However, PM is a lot more than numbers, tables, and scorecards. It's about perception, understanding, insight, and organizational learning.</p> <p>This highly interactive workshop will highlight new ways of thinking about PM and on using results for organizational learning and improvement. Topics to be discussed include: When PM goes bad; the value measurement frameworks; the importance of measurement leadership, the future of scorecards and dashboards; and PM maturity - what does it mean? <b>Level: Any</b></p>

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### Panel Discussion

#### *Ready to be a Credentialed Evaluator (CE)?*

The first ever Credentialed Evaluator (CE) program has been launched in Canada – learn more about the program, how to apply, what professional development to pursue, and hear first-hand from our panel about their experiences with demonstrating and evolving the suite of competencies for evaluation work.

Dr. Keiko Kuji-Shikatani, Vice-President, Professional Designations Program will introduce the Credentialed Evaluator (CE) program and moderate the panel discussion.

### Thematic Breakfast Roundtables

Thematic breakfast roundtables are a great opportunity for CES-ON conference participants to network and share their experiences in evaluation! Anyone is welcome to join. Led by volunteer facilitators, these informal groups discuss a shared interest in a particular area or topic of evaluation.

Thematic breakfast roundtable topics and facilitators will be announced soon.

### Networking & Awards Wine-Tasting Event

Join us in a special networking event as we recognize two Ontario-based evaluators who this year received the highest awards for exemplary contributions by individuals involved in the field of program evaluation.

Congratulations to **Dr. Paul Favaro**, Chief, Assessment & Accountability of the Peel District School Board, and **Dr. Christine Frank**, Evaluation Consultant for Christine Frank & Associates, for their outstanding contributions to the field of program evaluation!

Johnston Research Inc. 

