

“Embracing Evaluation in Tough Economic Times”

2009 Annual Conference October 1 – 2, 2009

Ramada Plaza Hotel • Toronto • Ontario

300 Jarvis Street

Conference Program - Day 1

Thursday October 1, 2009

Thank you to
Cathexis Consulting Inc.
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8:00 – 9:15 am	Registration and Breakfast <i>(Ballroom ABC)</i>
9:15 – 9:30 am	Welcome & Opening Address: <i>(Ballroom ABC)</i> <ul style="list-style-type: none"> ◆ Nichole Fraser-MacDonald, CES-ON Conference Co-Chair ◆ Shirley Von Sychowski, CES-ON Conference Co-Chair
9:30 – 10:30 am	Keynote Address: <i>(Ballroom ABC)</i> <ul style="list-style-type: none"> ◆ Dr. Linda Morra Imas, Co-director, International Program for Development Evaluation Training
10:30 – 10:45 am	Q & A / Discussion
10:45 – 11:15 am	Nutrition Break & Networking <i>(Ballroom ABC)</i>
11:15 – 12:45 pm	Concurrent Sessions A, B, & C (refer to attached for session information)
12:45 – 1:45 pm	Lunch & Evaluator Excellence Awards <i>(Ballroom ABC)</i>
1:45 – 3:15 pm	Concurrent Sessions D, E, & F (refer to attached for session information)
3:15 – 3:45 pm	Nutrition Break & Poster Session <i>(Ballroom AB)</i>
3:45 – 4:00 pm	Meet your CES-ON Board <i>(Ballroom ABC)</i> Conference Evaluation / Book Draw
4:00 – 5:00 pm	CES-ON Annual General Meeting <i>(Ballroom ABC)</i>

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Conference Program - Day 2

Friday October 2, 2009

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8:00 – 9:00 am	Registration
8:15 – 9:00 am	Thematic Breakfasts (Ballroom ABC)
9:00 – 10:00 am	<p>Panel Discussion (Ballroom ABC)</p> <ul style="list-style-type: none"> ◆ Dr. Carol Campbell, Director of Education Research and Evaluation Strategy Branch, Ontario Ministry of Education ◆ Dr. Lynette Gillis, President, Learning Designs Online ◆ Anne Routhier, Senior Director, Centre of Excellence for Evaluation, Treasury Board Secretariat ◆ Dan Wilson, Manager Policy, Research & Evaluation, Ontario Trillium Foundation <p><u>Moderator:</u> Terry Spencer, CES-ON Board Chair, Research and Evaluation Officer, London District Catholic School Board</p>
10:00 – 10:30 am	Q & A / Discussion
10:30 – 11:00 am	Nutrition Break & Networking (Ballroom ABC)
11:00 – 12:00 pm	<p>Live Audio Webcast with Dr. Michael Quinn Patton (Ballroom ABC)</p> <p><i>Organizational Development and Program Evaluation Consultant</i></p>
12:00 – 1:00 pm	Lunch (Ballroom ABC)
1:00 – 2:30 pm	Concurrent Workshops 1, 2, & 3 (refer to attached for session information)
2:30 – 2:45 pm	Nutrition Break (Ballroom AB)
2:45 – 4:30 pm	Concurrent Workshops 1, 2, & 3 Continued
4:30 – 4:40 pm	Conference Evaluation & Book Draw

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<p>Session A</p> <p>Using evaluation Results for Increased Accountability <i>(Ballroom AB)</i></p>	<p>Session B</p> <p>Exploring the Realities of Different Research Methodologies <i>(Ballroom C)</i></p>	<p>Session C</p> <p>Complex Evaluations <i>(Essex Lounge)</i></p>
<p>Improvement by Design: Key Strategies for Mapping Success.</p> <p>James McTavish Assessment Assistance Plus</p> <p>In difficult economic times the focus on accountability and value for money in any endeavour increases. Participants will learn to develop effective improvement plans that utilize data from completed evaluations. Topics will include selecting priorities, developing SMART goals, identifying appropriate strategies, establishing success indicators with corresponding monitoring methods and timelines.</p> <p>Level: Beginner/Intermediate</p>	<p>Challenges of Using Random Assignment for Social Program Evaluation</p> <p>Rob Assels Malatest & Associates</p> <p>Random assignment methodologies offer a superior method of attributing a causal link between treatment and outcome; however, there are many challenges faced by researchers when electing to use a random assignment study design. These include a range of administrative, methodological and ethical issues that need to be addressed. Rob Malatest will provide an overview of three "case studies" in which random assignment was initially identified as the preferred evaluation approach. Participants will leave with an understanding of which programs are ideally suited to random assignment evaluation methodology. Level: All</p> <p>In the Blink of an Eye: Conducting Utilization-Focused Evaluations with Sensitive Populations under Extreme Time Constraints</p> <p>Jenna van Draanen University of Toronto</p> <p>This paper focuses on two utilization-focused outcome evaluations that were conducted under heavy constraints. One for a family literacy program, the other for an Aboriginal university preparedness program. Cultural sensitivity was required throughout the process. It was challenging to conduct the evaluation in a tight time frame without losing scientific rigor. These challenges were overcome with a participatory and interactive process, reliance on established relationships, and creativity in methodology.</p> <p>Maintaining a utilization focus when evaluating in real-world situations requires careful consideration, flexibility and creativity. In this case, innovative solutions were reached that were sensitive to participant needs, that met time demands, and that maintained sufficient research methodology.</p> <p>Level: Beginner</p>	<p>Evaluating Model Programs: Supporting Policy for Sustainable Programming</p> <p>Donna Smith-Moncrieffe Public Safety Canada</p> <p>The paper explores the issues and challenges related to conducting multi-site evaluations of model programs in various regions across Canada. The author identifies key challenges and mitigation strategies that were experienced during the planning stages of 3 multi-site evaluations. The author also explores the path between planning evaluations of model programs, reporting to Treasury Board and then achieving sustainable funding to implement model programs on a continuous basis at the provincial and local levels of government.</p> <p>Level: Intermediate</p> <p>Large Scale Multi-Site Impact Evaluation: Lessons Learned Through Implementation</p> <p>Nicole Kenton Public Health Agency of Canada</p> <p>Harry Cummings Don Murray Harry Cummings & Associates Inc.</p> <p>This paper will focus on lessons learned from an evaluation of a multi-site community-based program, the Community Action Program for Children. The challenges and successes involved in implementing this quasi experimental design will be described as well as recommendations intended to support the evaluation of large scale community based programs.</p> <p>Level: Intermediate</p>

<p>Session D</p> <p>Creating A Community of Practice <i>(Ballroom AB)</i></p>	<p>Session E</p> <p>The Profession of Evaluation <i>(Ballroom C)</i></p>	<p>Session F</p> <p>Performance Management – A Strategic Move <i>(Essex Lounge)</i></p>
<p>Creating a Community of Practice in Ontario (Round Table Discussion)</p> <p>Martha McGuire Cathexis Consulting Inc.</p> <p>Keiko Kuji-Shikatani Ministry of Education</p> <p>Amanuel Melles United Way Toronto</p> <p>Now that CES is credentialing evaluators and requiring 40 hours of professional development to maintain a credentialed status, creating such opportunities becomes critical. Development of a community of practice is one way of providing professional development opportunities, often at little or no cost. Ottawa has formed a highly successful community of practice through regular ‘Lunch and Learns’. The purpose of this roundtable is to:</p> <ul style="list-style-type: none"> ▪ Discuss what learning opportunities already exist; ▪ Explore what else can be done to provide more learning opportunities; and ▪ Determine who is interested in actively pursuing the development of a community of practice. <p>Level: All</p>	<p>Making the Case for Professional Evaluation Expertise in Corporate Training, Testing and Credentialing Programs</p> <p>Dr. Sid Ali Research and Evaluation Consulting</p> <p>There is a need for professional evaluation expertise in the corporate training, testing and credentialing program domain. In tough economic times, corporations look to streamline and improve processes and often lack the in-house expertise to do so, creating opportunities for professional evaluators. Yet, there is a scarcity of this type of work documented in professional journals.</p> <p>Level: Intermediate</p> <p>Evaluator Compensation: Survey Findings</p> <p>Rochelle Zorzi Melissa McGuire Cathexis Consulting Inc.</p> <p>What is reasonable compensation for evaluators? What can students expect to earn if they choose a career in evaluation? What do employers need to offer if they want to recruit good evaluators?</p> <p>This paper will present the preliminary results of a survey of CES members. It will explore all elements of compensation as well as working environment for evaluators at different stages of their careers and with different educational backgrounds.</p> <p>Level: All</p>	<p>Building a Balanced Scorecard From the Inside Out</p> <p>Deborah Hardwick Simcoe Muskoka District Health Unit</p> <p>What happens when you try to create a performance management tool to measure progress towards a strategic plan, when you start at the program level? Deborah Hardwick will share her experience in developing a Balanced Scorecard at the Simcoe Muskoka District Health Unit.</p> <p>Level: All</p> <p>Performance Measurement Journey: Is There Light at the End of the Tunnel?</p> <p>Gloria Kay VHA Home HealthCare</p> <p>Improved measurement systems go hand-in-hand with enhanced accountability requirements. This presentation provides a synopsis of the quality improvement and performance measurement journey experienced by VHA Home HealthCare over the past 10 years. The development of operational and strategic performance measurement systems will be highlighted with particular focus on positive influences and essential elements that help to add value for the organization and clients served.</p> <p>Level: All</p>

Workshop 1 (Ballroom AB)	Workshop 2 (Ballroom C)	Workshop 3 (Essex Lounge)
<p>Measuring Social Return on Investment</p> <p>Dr. Harry Cummings Harry Cummings and Associates Inc.</p> <p>Social Return on Investment (SROI) can be used to improve services, improve relationships with stakeholders and make organizations more sustainable. SROI emerges from the theory and literature of cost benefit and cost effectiveness analysis of social projects. SROI gives a financial value to all social, environmental and economic outcomes achieved so that they can be added up and compared to the investment made. This results in a ratio of total benefits (a sum of all the outcomes) to total investments. SROI analysis can be used to help organizations gain credit and/or be compensated for the value they create in the marketplace. This workshop will provide an introduction to what SROI is and how it is used. Examples of SROI indicators will be examined and interactive exercises will be used with participants to demonstrate the application of SROI analysis.</p> <p>Level: All</p>	<p>Using Performance Measurement In Management Decision Making</p> <p>John Allen, MBA Management Consulting</p> <p>To make a real contribution, performance measurement must become an integral part of management, used in many decision making applications. This workshop describes how performance measurement can be used in a variety of management processes including strategic planning, operational planning and control, program evaluation, manager's performance contracting, and resource allocation.</p> <p>Level: Intermediate</p>	<p>Write to be Read & Transcribing and Coding Made Easy</p> <p>Dr. Christine Frank Independent Consultant</p> <p>Write to be Read</p> <p>Evaluation reports that are highly accessible and interesting can generate learning at all levels of an organization. Dynamic, readable writing has long been the focus of Business Communications experts, who have developed specific, easy-to-learn strategies. These strategies can and should be applied by researchers to make their documents more inviting and compelling. Writing styles learned in academic settings may actually hinder effectiveness. Spend 90 minutes practicing these simple strategies that will turn your evaluation reports into page-turners.</p> <p>Transcribing & Coding Made Easy</p> <p>Learn a very useful new function of NVivo8 which allows you to both transcribe and code interviews and focus groups within the program. The software allows you to both slow down and replay digital recordings for notation or full transcription, and then proceed to coding immediately. Tips for digital recording will be discussed and the process of importing, transcribing, and coding the digital files in NVivo will be demonstrated.</p> <p>Level: All</p>

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Biography of Keynote Speaker - Dr. Linda Morra Imas

Co-director, International Program for Development Evaluation Training (IPDET)

With over 30 years experience managing evaluations and evaluation units both nationally and internationally in developed, developing, and transition countries, Dr. Linda Morra Imas is a veteran of observing, doing, and building evaluation capacity in both good fiscal times and bad.

Dr. Morra specializes in capacity-building related to monitoring and evaluation. Her extensive and diverse experience ranges from an Evaluation Capacity Building Adviser for the World Bank Group, to a former director for the U.S. Government Accountability Office (aka the U.S. General Accounting Office) in charge of evaluation of education and employment and occupational health and safety programs for the U.S. Congress, to continuing to co-direct IPDET, a joint World Bank and Carleton University program. She is also co-author of a new book: *The Road to Results: Designing and Conducting Effective Development Evaluations*.

When she isn't traveling for business, she enjoys her family, gardening, and leisure travel, as well as being an Adjunct Professor with the Faculty of Public Affairs at Carleton and Secretary of the International Development Evaluation Association (IDEAS), for which she is currently leading an effort to develop competencies for those engaged in international development evaluation.

Biography of Dr. Michael Quinn Patton

Organizational Development and Program Evaluation Consultant

Dr. Michael Quinn Patton is an independent organizational development and program evaluation consultant. He is author of *Utilization-Focused Evaluation* (4th edition, Sage, 2008) and *Qualitative Research and Evaluation Methods* (3rd edition, Sage, 2002).

Dr. Quinn Patton is recipient of both the Myrdal Award for *Outstanding Contributions to Useful and Practical Evaluation Practice* from the Evaluation Research Society and the Lazarsfeld Award for *Lifelong Contributions to Evaluation Theory* from the American Evaluation Association. He is former President of the American Evaluation Association.

Dr. Quinn Patton teaches regularly in *The Evaluators Institute* and The World Bank's *International Program in Development Evaluation Training* (IPDET). He is co-author of *Getting to Maybe: How the World Is Changed* (Random House Canada, 2006) with Canadian colleagues Frances Westley and Brenda Zimmerman; the book applies complexity theory and systems thinking to innovation and developmental evaluation.

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Biographies of Workshop Presenters

Dr. Harry Cummings

Director, Harry Cummings and Associates Inc.

Dr. Harry Cummings is an internationally respected expert in programme evaluation, results-based management, regional and community economic analysis and regional development planning. As Director of Harry Cummings and Associates Inc. he has carried out assignments in a broad range of sectors while utilizing diverse methodologies and research methods. As a Professor at the University of Guelph,

Dr. Cummings teaches graduate courses in programme evaluation, research methods and regional economics. He has also designed and led numerous training workshops for international development practitioners, university academics, evaluation consultants and government representatives.

John Allen

Management Consultant

John Allen, MBA is a management consultant with over thirty years experience in performance measurement in publicly funded organizations. He has served government clients in Canada and the United States at the federal, state/provincial and municipal levels, as well as assisting a wide variety of not-for-profit organizations.

Mr. Allen has written articles on results management in government in a number of journals, and he often speaks at conferences on this topic. He also provides training and consulting services in Program Evaluation, Strategic Planning, Operations Management and Staff Performance Management.

Dr. Christine Frank

Independent Consultant

Dr. Christine Frank is an experienced researcher and veteran adult educator. Currently an independent consultant, she regularly conducts program evaluations and training for a range of organizations. As a former faculty member in the postgraduate Research Analyst Program at Georgian College, Dr. Frank taught Qualitative Methods and led students in large evaluation projects for eight years. One of her specialties is training researchers in the use of NVivo qualitative analysis software.

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Biographies of Conference Panellists

Dr. Carol Campbell

Director, Education Research & Evaluation Strategy Branch, Ontario Ministry of Education

Dr. Campbell has international experience in education policy, research and consultancy including strategies for raising student achievement and interventions for low performance; addressing educational and social disadvantage; teachers’ professional development; role and effectiveness of school districts; inter-agency working; and parent and community engagement.

Prior to moving to Ontario, Dr. Campbell was a member of faculty at the Institute of Education, University of London where she taught Masters and Doctoral programs in education policy, leadership, management and research. In Sept. 2006, Dr. Campbell was appointed as Ontario’s first Chief Research Officer to establish and develop the use of evidence across the Ministry’s education strategies, K-12, and to inform improved practices at provincial, district and school levels. Her current role involves providing a strategic focus, leadership and co-ordination for the Ministry’s application of research, evaluation and analysis for evidence-based policies, programs, improvement practices and results.

Dr. Lynette Gillis

President, Learning Designs Online (LDO)

Dr. Gillis is a cognitive and educational psychologist who is internationally recognized for her work in developing metrics for evaluating quality, effectiveness, and impact of training and eLearning programs, including the award-winning and highly successful eLearning business courseware, Harvard ManageMentor Plus® (HMM) currently used by more than four million managers worldwide.

Dr. Gillis has conducted more than 200 evaluation studies of training programs, national learning initiatives, and eLearning courseware libraries in wide-ranging domains including business, government, education, medicine, retail, not-for-profit, and the military. Her work has focused on developing evaluation methodologies and design techniques to help organizations optimize the impact and demonstrate the value of their training investments. For the past three years, Lynette and LDO business partner, Allan Bailey, have headed the Canadian *Investing in People* initiative—a \$1.3M national evaluation initiative undertaken by the Canadian Society for Training and Development and funded by Human Resources and Skills Development Canada to demonstrate the ROI of training in 12 firms in three industry sectors.

Dr. Gillis is also the author of *Quality Standards for Evaluating Multimedia and Online Learning* (McGraw-Hill 2000).

Anne Routhier

Senior Director, Centre of Excellence for Evaluation (CEE) – Expenditure Management Sector, Treasury Board Secretariat

The CEE is responsible for supporting the implementation of the *Policy on Evaluation* by providing leadership, advice and guidance in the conduct, use and advancement of evaluation practices across the federal government. Ms. Routhier also supported the implementation of the *Management, Resources and Results Structure (MRRS) Policy* and the *Guidelines for preparing departmental performance reports (DPRs)*.

Prior to her work at the Treasury Board Secretariat, Ms. Routhier was a senior policy analyst for the Privy Council Office's Policy Research Initiative, where she worked on the development and implementation of horizontal research frameworks on Canada-US and Canada-Mexico relations. Ms. Routhier also worked for about eight years as a senior evaluation officer at Human Resources Development Canada, studying the impacts of employment programs and employment insurance programs.

Dan Wilson

Manager of Policy, Research and Evaluation at the Ontario Trillium Foundation

Dan Wilson's experience with evaluation is rooted in his background in community development and health promotion and his over eight years at OTF. This year OTF spoke with more than 100 not-for-profit organizations and has hosted Community Roundtables across the province about the impact that the economic downturn was having in their communities; how prepared not-for-profits were to deal with the challenges they were facing; and how funders could work with the sector and with each other to offer effective help.