

Texas Evaluation Network and
Alamo City Evaluators

SUMMER INSTITUTE 2019

Aug. 15-17th | San Antonio, TX



ESSENTIAL AND EVOLVING SKILLS FOR EVALUATORS

UTSA Downtown Campus – Durango Building
501 W César E Chávez Blvd | San Antonio, TX

PRESENTED BY: TEXAS EVALUATION NETWORK

IN COLLABORATION WITH: THE UNIVERSITY OF TEXAS – SAN ANTONIO

AND: ALAMO CITY EVALUATORS

AGENDA AT A GLANCE (PART 1)

| Day & Time | Introductory Workshops | Intermediate Workshops | Intermediate Workshops | Focused Evaluation |
|---------------------|--------------------------------------------------------------------|------------------------------------------------|-------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| Thursday 10:00AM | TEN Informal Meeting Room Opens | | | |
| 1:00 - 2:30 PM | Program Evaluation 101: Telling Your Story with Program Evaluation | Multilevel Structural Equation Modeling (MSEM) | Data Visualization and Tableau | Appreciative Inquiry: A Participatory Action Method to Assess and Evaluate Communities |
| 2:45 - 4:00 PM | | | | Failing Forward: Developing Organizational Culture that Supports Evaluation |
| 4:15 - 5:15 PM | Conversation with TEN Board | | | |
| | Dinner on Your Own | | | |
| | | | | |
| Friday | TEN Informal Meeting Room Opens at 8:00 AM | | | |
| 8:30 - 10:00 AM | Modeling and Planning Your Evaluation | Introduction to Results-Based Accountability | Si Texas: A Multi-site Evaluation of 8 Integrated Behavioral Health Projects | Developing Cultural Competence in Evaluation |
| 10:15 - 11:30 AM | | | AT&T Aspire Evaluation: A Multi-site Multi-level Longitudinal Evaluation of High-School Completion Programs | Theory-Based Shared Measures for Evaluating Outcomes across Informal STEM Programs |
| 11:30 AM - 1:00 PM | Lunch (UTSA Food Court & Nearby Restaurants) | | | |

AGENDA AT A GLANCE (PART 2)

| Day & Time | Introductory Workshops | Intermediate Workshops | Intermediate Workshops | Focused Evaluation |
|--------------------------|-----------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------|-------------------------------------------------------------------------------------------|
| Friday 1:00 - 2:30 PM | Communicating with Funders and Leading Data Conversations | R Training | Quality Improvement for Evaluators | Using RBA in Community-Based and Applied Health Research: Balancing Rigor and Inclusivity |
| 2:45 - 4:00 PM | | | | RBA in action: A Look at How to Invite Data into Hard Conversations |
| 4:15 - 5:15 PM | World Cafe | | | |
| | Dinner on Your Own | | | |
| | | | | |
| Saturday | TEN Informal Meeting Room Opens at 8:00 AM | | | |
| 8:30 - 10:00 AM | Online Survey Design | Project Management Fundamentals for Evaluators - Traditional and Agile Approaches | Cost - Benefit Analysis | |
| 10:15 - 11:30 AM | | | | Evaluation in Policy |
| 11:30 AM - 12:00 PM | Closing Comments | | | |

TEXAS EVALUATION NETWORK INSTITUTE 2019



**DAY 1:
AFTERNOON
SESSIONS**

Thursday, August 15 1:00–5:15 pm

PROGRAM EVALUATION 101: TELLING YOUR STORY WITH DATA

HB Cavalcanti - San Antonio Area Foundation (1:00 - 4:00 pm)

Is it possible to tell your agency's story with program evaluation? How would you use evaluation to document your success stories? Can it help you find out what is working and what is not working? Could you measure your agency's impact in the community with it? This workshop explains how program evaluation can be used to tell your story: we will look at the reasons for conducting program evaluations, explore their potential benefits, and discuss the usefulness of using logic models to assess your agency's initiatives. Evaluations can be used to identify community needs, to document an agency's overall performance, or to measure the success of particular programs. You will learn about the tools needed to collect and analyze the data and how to deploy them. Finally, we will examine the importance of using evidence to showcase your agency's impact to key stakeholders (board members, staff, volunteers, clients, funders) and review resources you can use to conduct your own evaluations.

MULTILEVEL STRUCTURAL EQUATION MODELING (MSEM)

Chi-Ning Chang (Texas A&M University) and Dr. Guan Saw (UTSA) - (1:00 - 4:00 pm)

Multilevel Structural Equation Modeling (MSEM) is a useful and robust statistical approach to modeling latent factors with clustered samples, which are very common in evaluation and social science. This workshop will introduce participants to the assumptions and practical application of MSEM methods. There will be opportunities for participants to gain hands-on experience in implementing and interpreting the MSEM methods with real-world data through computer-based exercises. Participants are encouraged to bring a laptop computer with the free Mplus demo program installed and should be familiar with multiple regression analyses.

DATA VISUALIZATION IN TABLEAU

Brittany Fitz-Chapman - Prosper Waco (1:00 - 4:00 pm)

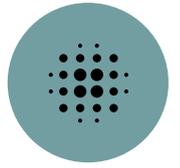
This workshop will take place in three sections: (1) an introduction about how to choose the right type of data visualization for your needs; (2) an introduction to Tableau and how to get started; and (3) build an interactive dashboard using publicly available data. Tableau is a tool used to visualize and analyze your data to make it easily digestible by your audience. Participants should bring a computer with them as we will be moving through various activities using Tableau. All activities can be done using the free version of Tableau, Tableau Public.

APPRECIATIVE INQUIRY: A PARTICIPATORY ACTION METHOD TO ASSESS AND EVALUATE COMMUNITIES

Emmerentie Oliphant & Lenola Wyatt, Stephen F. Austin State University (1:00 - 2:30 pm)

The presentation focuses on the use of appreciative inquiry in rural East Texas to revitalize Wards 1 and 2 in Lufkin, an historically marginalized community. Appreciative inquiry is a method to gain understanding of strengths, resources, resilience, needs and challenges of a community. This method is based on participatory action and community-driven principles. An ongoing cycle of assessment, intervention and evaluation resulted in sustainable change efforts in the community. The presentation will share how the community residents, leaders, agencies, youth and children were included in community cafés, key informant interviews, art interpretation, Photo Voice and a "Walk through the Community" initiative and will present a protocol to implement and evaluate appreciative inquiry.

TEXAS EVALUATION NETWORK INSTITUTE 2019



**DAY 1:
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SESSIONS**

Thursday, August 15 1:00–5:15 pm

FAILING FORWARD: DEVELOPING ORGANIZATIONAL CULTURE THAT SUPPORTS EVALUATION

Kate Robinson, Failing Forward (2:45 – 4:00 pm)

This interactive session will use the documentary short, *Failing Forward: On the Road to Social Impact* to illustrate how internal evaluation can bring big benefits to clients when there is an organizational culture to support it. We will have a lively discussion about how to apply some of the lessons learned in the film to your nonprofit. This session will bring enthusiasm and a fresh perspective to every social service non-profit's struggle with data and program effectiveness (and the role data can play in improving outcomes). It's a great opportunity to see the film together and use it as a springboard to have a guided, candid conversation about overcoming the barriers to effective internal evaluation.

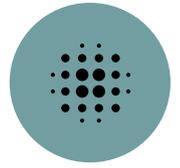
RECEPTION - A CONVERSATION WITH THE TEN BOARD

Texas Evaluation Network (TEN) Board of Directors (4:15 – 5:15 pm)

TEN is a voluntary statewide organization serving the multidisciplinary interests and needs of evaluation and other allied professionals. Our goals are to promote and advocate for evaluation, build evaluation capacity, and establish a venue for networking and the exchange of theoretical, methodological, and practical knowledge related to the field of evaluation. This session will focus on introducing the members of the Board and gathering participants' input and feedback on how to continue to advance these goals and build Texas's evaluation community.



TEXAS EVALUATION NETWORK INSTITUTE 2019



**DAY 2:
MORNING
SESSIONS**

Friday, August 16th 8:30 - 11:30 am

MODELING AND PLANNING YOUR EVALUATION

Steuck & Associates LLC (8:30 - 11:30 am)

Planning an evaluation can be seen as a daunting task for foundation grantees, new evaluators, and even experienced evaluators. The session will focus on the process of creating evaluation plans, estimating the evaluation budget, and briefly, working with external evaluators who are now required in many research and education grant solicitations. The presenter will walk through a multiple-step, cascading process used in planning evaluations and the documents produced at each step of the process. The outputs of the process will help grantees and evaluators in: drafting the evaluation sections of grant proposals, planning data collection, estimating the cost of doing the evaluation, and communicating the evaluation plan to stakeholders

The presenter has applied this model to an average of 15-20 proposals to federal, state, and private funding organizations per year.

INTRODUCTION TO RESULTS-BASED ACCOUNTABILITY

Henrietta Muñoz, United Way of San Antonio and Bexar County (8:30 - 11:30 am)

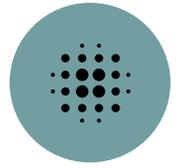
Results-Based Accountability (RBA™) is a disciplined way of thinking and acting to improve entrenched and complex social problems. Communities use it to improve the lives of children, youth, families, and adults. RBA is also used by organizations to improve the effectiveness of their programs. Developed by Mark Friedman and described in his book *Trying Hard is Not Good Enough*, RBA is being used in all of the 50 United States and in more than a dozen countries around the world to create measurable change in people's lives, communities and organizations. What's different about RBA? RBA uses a data-driven, decision-making process to help communities and organizations get beyond talking about problems to taking action to solve problems.

SI TEXAS: A MULTI-SITE EVALUATION OF 8 INTEGRATED BEHAVIORAL HEALTH PROJECTS

Michelle Brodesky (Methodist Healthcare Ministries of South Texas, Inc.) Karen Errichetti (Health Resources in Action) - (8:30 - 10:00 am)

Si Texas: Social Innovation for a Healthy South Texas was a five-year project and evaluation that tackled complex health conditions in South Texas through innovative approaches to health services. Eight (8) different organizations throughout the region - from the RGV to Laredo to the Coastal Bend - each implemented a different approach to integrating the delivery of primary care and mental health care. Each evaluation utilized a randomized control trial design or quasi-experimental design to determine the program's impact on patient health outcomes. Data was also combined into a portfolio-wide evaluation to determine the combined impact of all 8 programs. In this session, participants will learn about the design and management of these multiple evaluations and the partnership-centered evaluation approach the evaluators used to balance engagement of organizational stakeholders with the requirements of rigorous design. Specific steps taken in each phase of evaluation (from planning to dissemination) will be described. Participants will learn about key activities that facilitated success of the multi-site evaluation, including development of common measures, and evaluation capacity-building, and lessons learned for multi-site evaluations with diverse organizations.

TEXAS EVALUATION NETWORK INSTITUTE 2019



**DAY 2:
MORNING
SESSIONS**

Friday, August 16th 8:30 - 11:30 am

DEVELOPING CULTURAL COMPETENCE IN EVALUATION

Paula Johnson, Intercultural Development Research Association (8:30 - 10:00 am)

Evaluation is a means of identifying areas of success and opportunities for growth and improvement. In education, evaluation is a necessary tool that informs how to measure, and then achieve project goals more efficiently. As suggested by the American Evaluation Association (2011), "to ensure recognition, accurate interpretation, and respect for diversity, evaluators should ensure that the members of the evaluation team collectively demonstrate cultural competence." In this session we will explore the role of culture and cultural competence in quality evaluation, why cultural competence in evaluation is important, and essential practices for cultural competence. The goal of this session is to unpack the evaluation process through a cultural lens in relation to the ways in which we frame, construct, implement, and interpret instruments and findings.

AT&T ASPIRE EVALUATION: A MULTI-SITE MULTI-LEVEL LONGITUDINAL EVALUATION OF HIGH-SCHOOL COMPLETION PROGRAMS

Eric L. Rolfhus, Eishi Adachi, Emily A. Price, Sadeq Sohrabie, Lauren Decker; Gay Lamey, Westat (10:15 - 11:30 am)

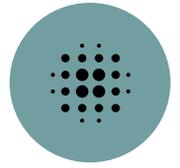
Participants in this session will learn best practices derived from conducting a six-year rigorous evaluation of over 50 programs operating in over 150 districts around the country. These AT&T Aspire-funded high-school completion programs vary widely in design; and the districts drawn from across the country, range in from very small and rural to the largest urban districts. AT&T requires a rigorous quasi-experimental impact evaluation using student-level data. In addition to granting agencies, many private funders now also require rigorous impact evaluations feasible only through the use of secondary student-level data provided by districts. The material covered will include real situations and concrete recommendations and solutions. The goal is to help participants efficiently conduct their own research, and successfully partner with local education agencies (LEAs) and external programs in rigorous evaluation, while avoiding common pitfalls. Participants will leave understanding best practices regarding: (1) The nuances of FERPA, MOUs, data-sharing agreements and LEA research applications, (2) Working effectively with district research staff to achieve a clean student-level data-set, (3) Collection of fidelity of implementation data from varied programs and integrating with estimated impacts, (4) Conducting program financial analysis and estimating return on investment (ROI) from estimated impacts, and (5) Developing the most-appropriate comparison groups (i.e. matching) depending on available district data.

THEORY-BASED SHARED MEASURES FOR EVALUATING OUTCOMES ACROSS INFORMAL STEM PROGRAMS

Guan Saw & Shon Brewington (UTSA), Ryan Culbertson (Texas PREP) - (10:15 - 11:30 am)

Prefreshman Engineering Program (PREP) is a seven-week STEM summer program offered to middle and high school students in grades six to eleven, over the course of four summers with different levels of STEM curriculum and learning activities. It currently serves mostly underrepresented students from middle/high schools in 34 college campuses in 25 cities across 7 states. This presentation focuses on the design and preliminary results of new statewide pre- and post-program surveys that assess the student experience and outcomes of PREP in Texas in the summer of 2019 across 22 sites and about 3,500 students.

TEXAS EVALUATION NETWORK INSTITUTE 2019



**DAY 2:
AFTERNOON
SESSIONS**

Friday, August 16th 1:00 – 5:15 pm

COMMUNICATING WITH FUNDERS AND LEADING DATA CONVERSATIONS

Karin Samii-Shore, Shore Research (1:00 – 4:00 pm)

At this 3-hour training you will have the chance to learn the Why, How, and When about using your data to communicate, make decisions and gain new insights about the value and impact of your programs. In the first hour we will tackle the WHY of building a communication plan before (YES BEFORE!) you conduct your evaluation and consider its benefits for you and your staff. Next, we dive into ideas for HOW to facilitate conversations with your staff and others around what your data mean and how to plan to act upon the insights you gain from these powerful conversations. Finally, we consider the WHEN, including when to share data with staff and others and how to help them make good use of the data to support your mission. This training will be very interactive, so participants should come ready to talk about their experiences with data sharing and learn some new skills. Participants will leave with a treasure trove of ideas and resources for how to facilitate data conversions and a draft communication plan to help staff use data regularly and knowledge about why this is important for long term success.

R TRAINING

Emily Diaz, Westat (1:00 – 4:00 pm)

This introductory R workshop will be divided into three parts. In the first part users will get an introduction to R including how to install R, download R packages, run basic commands, read data into R, and export R tables to Excel. In the second part users will learn how to run a t-test in R. In the third part, users will explore data visualization using the package ggplot2.

QUALITY IMPROVEMENT FOR EVALUATORS

Karen Sautter Errichetti (Health Resources in Action) and Michelle Brodesky (Methodist Healthcare Ministries of South Texas) – (1:00 – 4:00 pm)

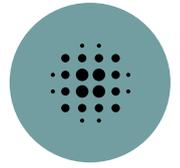
Organizations and their partners often use quality improvement strategies to build their initiatives, implement their ideas, assess their success, and continuously improve their work. As a result, evaluators are increasingly called upon to evaluate QI programs. This workshop introduces participants to the Model for Improvement and its Plan-Do-Study-Act (PDSA) methodology using an evaluator's lens. Participants will engage in interactive exercises to build the components of a QI project, including the development of a specific aim, the driver diagram, and a measurement strategy. This workshop will also demonstrate how to evaluate QI programs using established frameworks such as the Kirkpatrick Evaluation of Learning Framework.

USING RBA IN COMMUNITY-BASED AND APPLIED HEALTH RESEARCH

Erica Sosa, UTSA (1:00 – 2:30 pm)

This session will discuss how Results Based Accountability (RBA) was used as part of an effort to guide efforts among a collaborative of community-based and applied health researchers and partners. The aims of the collaborative were to increase research regarding health equity throughout Bexar County. Specifically, we will outline efforts to increase the rigor of the RBA methodology to enable the collaborative to be competitive for large grants and publications while staying true to the underpinnings of inclusivity and collective voice from which RBA benefits.

TEXAS EVALUATION NETWORK INSTITUTE 2019



**DAY 2:
AFTERNOON
SESSIONS**

Friday, August 16th 1:00 – 5:15 pm

RBA IN ACTION: A LOOK AT HOW TO INVITE DATA INTO HARD CONVERSATIONS

Brittany Fitz-Chapman, Prosper Waco (2:45 – 4:00 pm)

The collective impact approach to problem solving is often used to address problems that are complicated, complex, and hard to understand. Unfortunately, that means that the data needed to inform decision-making for the issue can also be complicated, complex, and hard to understand. Through a hands-on experience, the data and communication team from Prosper Waco will demonstrate how they answer the difficult questions. The session will walk attendees through the data collection process, how to incorporate community voice, and ultimately review the new data visualization tool used throughout the community. The presenters will use a real time tool developed in conjunction with community members and partnering organizations. They will also explore lessons learned the hard way, the quick victories, and explore the long-term implication of effective visualizing data for the community's use.

WORLD CAFE

Alfredo Ortiz, University of the Incarnate Word (4:15 – 5:15 pm)

World Café is a methodology intended to dig deep into “questions that matter” to the participants (i.e. any topic that is of mutual interest to the participants of the event). World Café uses a café-like setting to help bypass normal frames of relating between people, which helps participants engage in deep conversations and generate meaningful knowledge with others with whom they may not normally engage. By using 3-4 rounds of conversation and shifting tables, participants cross-fertilize ideas in ways that lead to deep insights and major themes that can be harvested at the end of the event—in addition to generating rich qualitative data that can be analyzed after the event. These themes have been lightly “validated” by virtue of the fact that they have emerged from across multiple conversations from participants. World Café can be used to: a) generate, frame and validate initial ideas that are worth exploring further through other means; b) to assess (evaluate) lessons learned at the end of a shared experience; or c) to explore questions that matter at any point in a process (OD, action research, etc.). Regardless of its use, participants become aware of how all methodology enables and constrains people’s participation and knowledge, which may help them make better methodological decisions in their work.

**DAY 3:
MORNING
SESSIONS**

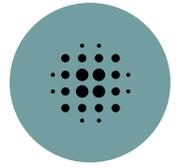
Saturday, August 17th 8:30 – 11:30 am

ONLINE SURVEY DESIGN

Gary Wingenbach, Texas A&M University (8:30 – 11:30 am)

Online Survey Design Principles & Best Practices (Thursday afternoon): This session is tailored for any evaluator who wants to maximize the online survey experience. Topics include survey design tips, question type/item response, response rates, and ensuring reliability and validity of data collection. This session also includes establishing survey purpose, satisfying behaviors, targeting audiences, reminders, respondent confidentiality, and data analyses.

TEXAS EVALUATION NETWORK INSTITUTE 2019



**DAY 3:
MORNING
SESSIONS**

Saturday, August 17th 8:30 - 11:30 am

PROJECT MANAGEMENT FUNDAMENTALS FOR EVALUATORS - TRADITIONAL AND AGILE APPROACHES

Korinna Lark (Comcast), Moira Rivera (CRG, Inc.) - (8:30 - 11:30 am)

Evaluations can be highly complex projects, subject to the challenges of working with multiple stakeholders, with and within organizations, and around resource constraints. The ability to effectively manage a project may be as important to the success of an evaluation as traditional evaluation skills. Fortunately, there is a wealth of project management frameworks, tools, and techniques available to prepare evaluators for and reduce uncertainty and risk associated with complex evaluation projects. This workshop will provide an overview of useful project management frameworks, tools, and templates; examples of the successful application of such tools to program evaluation projects; case studies of evaluations that might have benefitted from more thorough application of project management tools and techniques; and activities to build participants' project management skills.

COST - BENEFIT ANALYSIS

Sadeq Sohrabie, Westat (8:30 - 11:30 am)

Discussions of program impact are often framed solely in terms of effect size and statistical significance. However research evidence can be framed in terms that are used in economics and finances as well. This approach can be of interest for organizations that invest in interventions and programs, and would like to see or present the results in terms of cost and benefits. The purpose of this workshop is to familiarize the audience with cost analysis, cost effectiveness, benefit-cost analysis and their applications in program evaluation.

EVALUATION IN POLICY

Details forthcoming (10:15 - 11:30 am)

