Fundamentals of Program Evaluation: foundations for clear-thinking & well-managed practice

Ian C. Davies, CE
Overview of the workshop

Introductions
- Goal of the workshop
- Presentations & expectations

Setting the stage: evaluation as valuing
Two distinct & inter-related components of an evaluation
- Evaluation process – PART 1
- Evaluation management – PART 2
Setting the stage (1)

Evaluation as valuing

- **Characteristics of evaluation compared to other kinds of assessments and studies**
  e.g. reviews, research, audits, studies, etc.

- **Professionalism in evaluation**
  explicit theoretical and value foundations, principles, conceptual frame of reference, terminology, knowledge, skills and abilities; that are nurtured and evolve continuously through study, learning and reflective practice.
Evaluation as valuing

- Evaluation recognises and **celebrates different world views** and contributes to a better world for all living species.
- Evaluation as an **activist process** for sustainability, freedom and justice.
- Evaluation as a conscious, informed and willing **political process**.
Workshop
Part 1 – Evaluation Process
1.1 Framing

✓ **Purpose**
  the value that the evaluation will create

✓ **Objective**
  the overall question the evaluation seeks to address

✓ **Evaluand**
  what will be evaluated

✓ **Scope**
  boundaries, what’s in, what’s out
1.1 Framing

✓ **Approach**
  the valuing frame that evaluative judgment will consider

✓ **Methodology**
  how the evaluation proposes to fulfill its purpose, provide an evaluative judgment and address the overall question, considering time, resources and context.
1.2 Methodology

- Design
- Specific questions or objectives
- Data collection methods
- Sources and types of data
- Analytical framework
- Findings of fact, i.e. evidence
- Evaluative reasoning
- Conclusions
1.3 Knowledge, communication, use & action

- Surfacing knowledge from the program
- Drawing knowledge through and from the evaluation
- Generating recommendations
- Communicating
- Supporting use & action
Workshop
Part 2 – Evaluation management
2.1 Resources & relationships

- Timeline, resources, budget
- Contract management relationship
- Governance (of the evaluation) relationship
  e.g. steering committee
- Technical relationship
  e.g. with evaluation “manager” for the commissioner
2.2 Quality & standards

- Quality control
- Quality assurance
- Evaluation principles, norms and standards
  including ethics & professional limitations
2.3 Risks, confidentiality, protection of information

- Risk assessment and management
- Consent, non-disclosure
- Protection and safeguarding of data and information
- Intellectual property rights
- Professional insurance
THANK YOU

idavies@capacity.ca