



# aes 19

International **Evaluation** Conference

Conference workshops 15 & 19 September

Conference 16–18 September 2019

**Sydney** | **Australia**

*'Evaluation un-boxed'*

## CONFERENCE WORKSHOPS Program and registration details

**Pre-conference: Sunday 15 September 2019**

**Post-conference: Thursday 19 September 2019**

**International Convention Centre Sydney**

14 Darling Drive, Sydney NSW, Australia

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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](#).

**as of 13 August 2019**

**Sunday 15 September 2019**

8 – 9 am REGISTRATION						
9 am – 12:30 pm	<b>Rubrics-enhanced evaluation</b> <b>FULLY BOOKED</b> Jane Davidson, Kate McKegg, Nan Wehipeihana  <b>FULL DAY</b>	<b>Theories of evaluation</b>  Brad Astbury  <b>FULL DAY</b>	<b>A gentle introduction to the collection and analysis of statistical data for evaluation</b>  Mark Griffin  <b>FULL DAY</b>	<b>Designing social impact evaluation</b>  Ruth Aston, Rachel Aston, Timoci O'Connor  <b>FULL DAY</b>	<b>Developing Monitoring and Evaluation Frameworks</b>  Ian Patrick, Anne Markiewicz  <b>FULL DAY</b>	<b>Managing sustainable evaluation functions in dynamic organisational contexts</b>  Penny Hawkins  <b>FULL DAY</b>
12:30 – 1:30 pm LUNCH						
1:30 – 5 pm	<i>Davidson, McKegg, Wehipeihana continued</i>	<i>Astbury continued</i>	<i>Griffin continued</i>	<i>Aston, Aston, O'Connor continued</i>	<i>Patrick, Markiewicz continued</i>	<i>Hawkins continued</i>
5 pm WORKSHOPS END						

Tea breaks: Morning tea 10.30 – 11 am | Afternoon tea 3 – 3:30 pm

Thursday 19 September 2019

8 – 9 am REGISTRATION						
9 am – 12:30 pm	<p><b>Empowerment evaluation</b></p> <p>David Fetterman</p> <p><b>HALF DAY</b></p>	<p><b>Making it stick 2 – Impactful evaluation reporting and beyond</b></p> <p>Samantha Abbato</p> <p><b>HALF DAY</b></p>	<p><b>Introduction to program logic and theory of change</b></p> <p>Carina Calzoni</p> <p><b>FULL DAY</b></p>	<p><b>Out of the program box: Evaluating place-based and systems change approaches</b></p> <p>Jess Dart</p> <p><b>FULL DAY</b></p>	<p><b>Moving from evaluation to valuation</b></p> <p>Taimur Siddiqi, Arjun Ravi</p> <p><b>FULL DAY</b></p>	<p><b>Questionnaire design: Asking the right questions</b></p> <p>Jasper Odgers, Klas Johannson</p> <p><b>HALF DAY</b></p>
12:30 – 1:30 pm LUNCH						
1:30 – 5 pm	<i>Fetterman continued</i>	<i>Abbato continued</i>	<i>Calzoni continued</i>	<i>Dart continued</i>	<i>Siddiqi, Ravi continued</i>	<p><b>Applying implementation science to evaluation: an introduction to implementation evaluation</b></p> <p>Jessica Hateley-Browne, Vanessa Rose</p> <p><b>HALF DAY</b></p>
5 pm WORKSHOPS END						

Tea breaks: Morning tea 10.30 – 11 am | Afternoon tea 3 – 3:30 pm

## SUNDAY 15 SEPTEMBER

### PRE-CONFERENCE WORKSHOP DESCRIPTIONS

#### Categories:

- A. Foundational evaluation skills and capabilities
- B. New tools; approaches and ways of thinking
- C. Advanced evaluation topics

#### **FULLY BOOKED!** Rubrics-enhanced evaluation

presented by Jane Davidson, Kate McKegg, Nan Wehipeihana. **FULL DAY | CATEGORY: C**

Evaluation, by definition, is fundamentally about asking and answering evaluative questions (i.e., questions about merit/quality, worth/value, and significance/importance). Not just 'What were the results?' but 'How good, valuable, and/or important were they?' Rubrics-Enhanced Evaluation is a powerful and flexible approach for

1. clearly defining what constitutes 'good', 'valuable' or 'important' in a particular context, and why; and
2. the systematic and transparent interpretation of qualitative and quantitative evidence relative to these well-grounded definitions.

This workshop is suitable for new and experienced evaluators alike. Topics include how to make your evaluation questions truly evaluative; what rubrics are and what they are for; different rubric designs and when to use them; rubric development processes for collaborative or independent evaluation; validation and field testing tips; and rubrics-enhanced evaluation reporting. Rubrics mesh well with a diverse range of evaluation approaches. They are particularly helpful when the most important outcomes are those least easily measured.

**Jane Davidson** is best known for pioneering the increasingly popular Evaluation Rubrics Methodology, along with her various other refreshingly practical evaluation frameworks and approaches. Originally from Aotearoa New Zealand, Jane is former Associate Director of The Evaluation Center at Western Michigan University, where she launched and directed the world's first fully interdisciplinary Ph.D. in Evaluation. She was 2005 recipient of the American Evaluation Association's Marcia Guttentag Award, and serves as Honorary Principal Fellow at the University of Melbourne. Jane is currently based in Seattle, and is sought after internationally as a speaker, author, evaluation coach, workshop and webinar presenter, and creator of awesome evaluation frameworks and tools.

**Kate McKegg** is the director of The Knowledge Institute Ltd and a member of Kinnect Group as well as an indigenous led collective Tuakana Teina, based in the Waikato region of New Zealand. Kate has worked in evaluation, evaluation capacity building, research, policy and public sector management since the late 1980s. She has a deep commitment to social and environmental justice and strives daily to decolonize her thinking and actions to support to indigenous colleagues in struggles for justice, sovereignty, healing and revitalization.

**Nan Wehipeihana** is the director of Research Evaluation Consultancy Ltd and a member of Kinnect Group. Nan tribal affiliations are to Ngāti Tukorehe and Ngāti Raukawa, north of Wellington and to Ngāti Porou and Te Whānau-ā-Apanui on the East Coast of New Zealand. Nan specializes in evaluation with a focus on Māori (Indigenous New Zealanders) and building evaluation capacity with tribes and Māori organisations to evidence outcomes including cultural outcomes. By bringing the voices and views of Māori to government and funders, she aims to offer insight into Māori values, perspective and experiences for use in government, business and community contexts.

#### Theories of evaluation

presented by Brad Astbury **FULL DAY | CATEGORY: A, C**

This workshop provides an overview of the origins and evolution of evaluation theory. Attention to theory in evaluation has focused predominantly on program theory and few evaluation practitioners have received formal training in evaluation theory. This workshop seeks to remedy this by introducing a framework for conceptualising different theories of evaluation and a set of criteria to support critical thinking about the practice-theory relationship in evaluation.

Participant will learn about:

- the nature and role of evaluation theory
- major theorist's and their contribution
- approaches to classifying evaluation theories
- key ways in which evaluation theorist's differ and what this means for practice
- dangers involved in relying too heavily on any one particular theory, and
- techniques for selecting and combining theories based on situational analysis.

Case examples will be used to illustrate why evaluation theory matters and how different theoretical perspectives can inform, shape and guide the design and conduct of evaluations in different practice settings.

This workshop aligns with competencies in the AES Evaluator's Professional Learning Competency Framework. The identified domains are:

- Domain 1 – Evaluative attitude and professional practice
- Domain 2 – Evaluation theory
- Domain 4 – Research methods and systematic inquiry

The workshop is designed for both new and experienced evaluators and commissioners of evaluation.

**Brad Astbury** is a senior manager at ARTD Consulting and works out of the Melbourne office. He has over 18 years' experience in evaluation and applied social research and considerable expertise in combining diverse forms of evidence to improve both the quality and utility of evaluation. He has managed and conducted needs assessments, process and impact studies and theory-driven evaluations across a wide range of policy areas for industry, government, community and not-for-profit clients. Prior to joining ARTD in 2018, Brad worked for over a decade at the University of Melbourne, where he taught and mentored postgraduate evaluation students.

## A gentle introduction to the collection and analysis of statistical data for evaluation

presented by Mark Griffin **FULL DAY | CATEGORY: A**

A robust evaluation makes use of both qualitative and quantitative research methods. At the same time many people commissioning or conducting evaluations have little training or understanding of quantitative methods such as survey design and statistics. Indeed some colleagues may even face some anxiety thinking about such methods. This workshop is not intended to turn evaluation practitioners into hard-core data scientists, but the goal instead is to give evaluation practitioners the tools necessary to work productively and in close collaboration with data scientists and to give evaluation commissioners the tools necessary to scope out projects involving statistical components, to assess the value of subsequent bids from potential statistical consultants, and to maximise the potential for statistical work to lead to true insights and business value within the commissioner's organisation. With such a goal this workshop will not focus on the specific technical intricacies of the mathematical techniques discussed, instead it will focus on a series of case studies where statistical methods have been applied in a sophisticated manner (and in so doing will introduce a range of statistical methods and the types of research questions that can be asked using each method, and some basic guidelines in proper statistical practice such as the importance of checking statistical properties of a dataset prior to conducting the analysis).

During this workshop the following topics will be presented:

- Designing an evaluation project including a statistical component
- Survey design and data collection
- Statistical methods that could be employed
- Writing up and presenting statistical results

Approximately two thirds of the workshop will be spent in the presentation of PowerPoint slides, and the remaining third will be spent dividing into small groups where each group will discuss how the statistical methods presented have or could be used within the projects that the participants are involved in.

**Mark Griffin** is the Founding Director of Insight Research Services Associated ([www.insightrsa.com](http://www.insightrsa.com)), and holds academic appointments at the University of Queensland and the University of Sydney. Mark serves on the Executive Committee for the Statistical Society of Australia, and is the Founder and Co-Chair of the Special Interest Group for Business Analytics within the International Institute of Business Analysis. Mark has been the primary statistician for a number of large surveys (including a survey of 140,000 parents receiving the Positive Parenting Program in Queensland), and Insight is a member of a number of government panels including that for the

Therapeutic Goods Association within the Australian Department of Health. Since the formation of Insight Mark has presented over 90 two-day and 15 five-day workshops in statistics around Australia, and has recently started an annual international speaking tour

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## Designing social impact evaluations

presented by Ruth Aston, Rachel Aston, Timoci O'Connor **FULL DAY | CATEGORY: B**

The number of complex social programs aiming to achieve social impact continues to grow. However, evaluating their impact is not simple; the challenge is ensuring that evaluation designs produce evidence to satisfy funding requirements and simultaneously maintain rigour to evaluate the impact of complex efforts (Gargani & Donaldson, 2011). We will introduce key measurement issues, and existing approaches to evaluating social impact—delineating their strengths and limitations at various stages throughout the program life cycle [needs assessment, program design, implementation, program maintenance, etc]. We will also briefly address the role of frameworks and schools of thought often associated with social impact including but not limited to Collective Impact, co-design, implementation science, systems thinking and social complexity. Participants will then apply this knowledge in a series of exercises including developing social impact evaluation questions, and using these questions to consider and design an evaluation methodology. A guest speaker from an organisation implementing social impact programs will facilitate a discussion concerning considerations for commissioning and funding social impact evaluations. Lecture, group discussions, and exercises will be used in this 1-day workshop. An evaluation case study will be provided; however, participants are encouraged to bring a case from their own practice.

At the end of the workshop participants will be able to:

1. Develop social impact evaluation questions
2. Categorise social impact evaluation questions based on the program life cycle
3. Identify key methodological design considerations for social impact evaluation questions
4. Select and justify an approach to assessing impact in an evaluation case study
5. Describe existing approaches to evaluating social impact and identify their strengths and weaknesses
6. Describe and explain how formative and summative evaluation can be applied in a social impact evaluation
7. Critically discuss practical considerations for the design and implementation of a social impact evaluation in a real-world setting

**Ruth Aston** is a Research Fellow and Lecturer at the Centre for Program Evaluation at The University of Melbourne. Ruth is currently working on several evaluations in education and public health, including the Evaluation of the Indigenous Australians' Health Program and the Evaluation of the Differentiated Support for School Improvement in Victoria. Ruth has completed her PhD and investigated social change in public health. Focussing particularly on the development of criteria for articulating success in achieving outcomes in complex multi-level, multi-site interventions in communities aiming to achieve social change in health outcomes. This is where her research interests lie, and she is testing measurement models to capture and test criteria for successful implementation (and effectiveness) of complex interventions (policy, programs, initiatives) to achieve enduring social change.

**Rachel Aston** is an experienced social researcher and evaluator at ARTD Consultants. She brings over eight years' experience conducting research and evaluation for government, NGOs and in the higher education sector. Rachel has a high level of expertise in qualitative and mixed-methods research, and evaluation methodology, with an academic background in anthropology and social research. Her background enables her to construct evaluation designs that are responsive to client needs and stakeholder engagement. She is particularly interested in the use of participatory and empowerment evaluation approaches to increase the accuracy and utilisation of evaluation findings. Rachel is skilled in translating and communicating evaluation findings to a wide audience to ensure that they are used to inform decision-making, program design and implementation.

**Timoci O'Connor** has evaluation and research expertise in the fields of international development, public health and education, particularly in the Pacific region, New Zealand, Australia and Southeast Asia. Tim has over 10 years' experience working with diverse populations and in various settings from community, private, government, NGOs, academia, and philanthropic organisations. Tim also coordinates, lectures and tutors into a range of subjects including Mixed Methods Research & Evaluation, Qualitative Methods for Evaluation, Health Program Evaluation, Developing Evaluation Capacity and Relating Health & Learning. Timoci is pursuing his PhD study exploring the use and feedback of evaluative information through information communication technologies.

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## Developing Monitoring and Evaluation Frameworks

presented by Ian Patrick and Anne Markiewicz **FULL DAY | CATEGORY: A**

The development and implementation of Monitoring and Evaluation Frameworks at strategy, program and project levels are important processes to adopt in order to provide an indication of results achieved and to resource organisational learning. The Monitoring and Evaluation Framework defines the parameters of routine monitoring and periodic evaluation that will take place over the life of a program or other initiative. The workshop provides participants with useful, step by step practical guidance for developing a Monitoring and Evaluation Framework, supported by relevant background and theory. It presents a clear and staged conceptual model, discusses design and implementation issues and considers any barriers or impediments, with strategies for addressing these. Participants will learn the format and approach for developing a Monitoring and Evaluation Framework, the range of techniques and skills involved in its design and implementation and develop an appreciation of the parameters of the tasks involved and how to approach them.

Participants will learn:

- The value and purpose of investing in and developing Monitoring and Evaluation Frameworks;
- The participatory approach and processes involved in developing such frameworks;
- The steps and stages involved and the suggested 'Table of Contents' for constructing a Monitoring and Evaluation Framework.

The trainer will alternate between use of a PowerPoint presentation and small group interactive work. The workshop follows a case-study approach and involves participants in the development of a Monitoring and Evaluation Framework for the case-study. In this way, the approach to training is participatory and hands-on while still conveying sufficient theory and context.

**Ian Patrick** is an independent consultant and Director of Ian Patrick and Associates. His career as an evaluator extends over around 20 years and includes a focus on both Australia and the Asia Pacific region. He has broad experience across different social sectors such as health, education, law and justice, community development, and human rights and Indigenous issues. Ian has worked with a range of organisations and programs in developing monitoring and evaluation systems, and has conducted evaluation-related training programs including on Introduction to Evaluation, Participatory Approaches in Evaluation, and Developing Monitoring and Evaluation Frameworks. He was awarded the AES Best Evaluation Policy and System Award in 2012 for the Monitoring and Evaluation Framework, Mongolia Australia Scholarship Program. Ian is an Honorary Senior Fellow, Development Studies Program at the University of Melbourne and was previously the leader of the evaluation practice area at the International NGO Training and Research Centre, UK

**Anne Markiewicz** is an independent evaluation consultant and Director of Anne Markiewicz and Associates. She has developed a significant number of Monitoring and Evaluation Frameworks and completed a wide range of evaluation projects for government departments, non-government organisations and international agencies. Anne's practice as an evaluator highlighted the need for early evaluation planning to provide a clear and agreed focus, develop a theory-based and evaluation-led approach, and ensure data availability to support the production of credible and useful findings that furnish and support organisational learning, program improvement and wider accountability. Anne has increasingly focused her career in designing and delivering training on the development of Monitoring and Evaluation Frameworks. Anne has received a number of awards for excellence in evaluation and is a Fellow of the Australasian Evaluation Society. Anne Markiewicz and Ian Patrick are co-authors of the text book 'Developing Monitoring and Evaluation Frameworks' published through SAGE. This training program is based on that text book and the training has been delivered extensively in the Australia-Pacific region and for the American Evaluation Association.

## Managing sustainable evaluation functions in dynamic organisational contexts

presented by Penny Hawkins **FULL DAY | CATEGORY: C**

The purpose of this workshop is for participants to learn about what makes evaluation functions sustainable and how to lead and manage evaluation in different organisations and contexts to enhance its effectiveness and sustainability.

Participants will learn about

- the factors that affect evaluation sustainability
- management approaches specific to evaluation and related activities
- organisational dynamics and evaluation
- how context, including political contexts, can affect the sustainability of evaluation
- the role of evaluation in a dynamic and fast changing world.

The workshop will provide an opportunity to explore the issues that affect evaluation systems in organisations; identify the components of sustainable evaluation systems and how these support the evaluation function to adapt to challenges as these emerge; and also work through approaches to the development of sustainable evaluation systems in particular organisations. Participants will gain insights through a combination of short presentations by the workshop facilitator and the shared practice wisdom of participants, resulting in a broader and deeper understanding of how evaluation systems either succeed or become unsustainable.

**Penny Hawkins** is an evaluation specialist with three decades of experience in international development evaluation and public policy across a wide range of sectors and organisations. Penny is the former Head of Evaluation at the UK Department for International Development (DFID). Over the past 20 years she has held evaluation leadership and management roles in government and philanthropic sectors, including at The Rockefeller Foundation in the USA and as Head of Evaluation for the Ministries of Foreign Affairs and Trade and Social Development, New Zealand. Penny has also held international evaluation leadership roles including as Chair of the OECD-DAC Network on Development Evaluation (2013-16) and as a former President and current Fellow of the AES. Penny is the founder and CEO of a woman-owned and operated international development evaluation consultancy with offices in New Zealand and Scotland. She works internationally with philanthropic, multi-lateral and private sector organisations to align strategy with impact and develop relevant and effective monitoring, evaluation and learning systems.



## THURSDAY 19 SEPTEMBER

### POST-CONFERENCE WORKSHOP DESCRIPTIONS

#### Categories:

- A. Foundational evaluation skills and capabilities
- B. New tools; approaches and ways of thinking
- C. Advanced evaluation topics

### Empowerment evaluation

presented by David Fetterman **FULL DAY | CATEGORY: B**

Empowerment evaluation builds program capacity and fosters program improvement. It teaches people to help themselves by learning how to evaluate their own programs. Key concepts include: a critical friend, cycles of reflection and action, and a community of learners. Principles guiding empowerment evaluation range from improvement to capacity building and accountability. The basic steps of empowerment evaluation include: 1) establishing a mission or unifying purpose; 2) taking stock – creating a baseline to measure growth and improvement; and 3) planning for the future – establishing goals and strategies to achieve objectives, as well as credible evidence to monitor change. A dashboard is used to compare annual goals with quarterly progress. The role of the evaluator is that of a coach or facilitator in an empowerment evaluation, since the group is in charge of the evaluation itself. The workshop will also highlight how empowerment evaluation produces measurable outcomes with case examples ranging from high tech companies such as Google and Hewlett-Packard to work in rural Arkansas and squatter settlements in South Africa. Employing lecture, activities, demonstration and discussion, the workshop will introduce you to the theory, concepts, principles, and steps of empowerment evaluation as well as the technological tools to facilitate the approach.

**David Fetterman** is President and CEO of Fetterman & Associates, an international evaluation consulting firm. He has 25 years of experience at Stanford University, serving as a School of Education faculty member, School of Medicine director of evaluation, and senior member of Stanford administration. Fetterman concurrently serves as a faculty member at Pacifica Graduate Institute, the University of Charleston, and San Jose State University. He is also a co-director of the Arkansas Evaluation Center. Previously, Dr. Fetterman was a professor and research director at the California Institute of Integral Studies, Principal Research Scientist at the American Institutes for Research, and a senior associate at RMC Research Corporation.

David is a past president of the American Evaluation Association. He received both the Paul Lazarsfeld Award for Outstanding Contributions to Evaluation Theory and the Myrdal Award for Cumulative Contributions to Evaluation Practice. Fetterman also received the American Educational Research Association Research on Evaluation Distinguished Scholar Award and the Mensa Award for Research Excellence. He is the founder of empowerment evaluation. He has published 17 books, including *Collaborative, Participatory, and Empowerment Evaluation: Stakeholder Involvement Approaches* (with Rodríguez-Campos and Ann Zukoski), *Empowerment Evaluation: Knowledge and Tools for Self-assessment, Evaluation Capacity Building, and Accountability* (with Kaftarian and Wandersman), *Empowerment Evaluation in the Digital Villages: Hewlett-Packard's \$15 Million Race Toward Social Justice*, *Empowerment Evaluation Principles in Practice* (with Abraham Wandersman), *Foundations of Empowerment Evaluation*, and *Ethnography: Step by Step*.

### Making it stick 2 – Impactful evaluation reporting and beyond

presented by Samantha Abbato **FULL DAY | CATEGORY: B**

In this workshop we go outside the box of evaluation reporting to the use of technical advances and a transdisciplinary environment for maximising evaluation communication and use. It is designed for professionals who need to communicate evaluation findings and want to do so with greater effect. This will benefit evaluators and other professionals at an intermediate level of evaluation report crafting.

This workshop is for evaluators and other professionals who would like to:

- Improve their skills in professional writing for impact.
- Use technological advances in digital methods to move beyond the traditional written report to incorporating visual approaches such as video.
- Incorporate design-thinking to communicate with stakeholders; Go beyond infographics to a suite of innovative technological approaches for evaluation communication with graphic design and system thinking.
- Use advances in data dashboard capability to keep the evaluation conversation going.

The workshop will be interactive, involve the sharing of experiences as well as hands-on activities. Out-of-the-box case studies from the experience of the presenter as part of an interdisciplinary team including: Videography, Graphic Design, Virtual Reality, Systems Thinking and Organisational Psychology will be discussed.

Participants will be provided opportunities to apply new skills to their own work. Building from the 'Making it Stick' introductory workshop, four main areas will be covered:

1. Professional writing for impact: Reduce content by 25% or more and increase the precision, clarity, persuasiveness and usability of your reports.
2. Video reporting: Use of technology we all have at our fingertips (e.g. Smartphones), videography and digital evaluation interview.
3. Beyond infographics: Innovative visual tools such as online systems thinking graphics, design-thinking, graphic design and embedded.
4. Data dashboards: Practical communication tools that keep the conversation going and maximise continued stakeholder engagement and motivation.

**Samantha Abbato** is an evaluation consultant and director of Visual Insights, a Pictures and Stories approach to evaluation. As an independent evaluation consultant for the past 14 years working with more than 50 NGO and government organisations in Queensland, New South Wales, the Northern Territory and England, she regularly applies innovative transdisciplinary approaches to evaluation and reporting. Her evaluation work is based on an extensive quantitative and qualitative academic background that includes a PhD in epidemiology (UC Berkeley), an MPH in biostatistics and four years of applied academic training in the qualitative methods of medical anthropology (UC Berkeley) applied to a thesis and publication in Aboriginal and Torres Strait Islander health. She is a specialist in health and community sector evaluation with extensive experience in qualitative and quantitative evaluation approaches

With a passion for communication, maximising evaluation use, and a transdisciplinary approach to evaluation, the facilitator is able to offer a wealth of case studies of unboxing and increasing the impact of evaluation reporting using transdisciplinary approaches. Her most recent evaluation work includes evaluation and M&E reporting using systems thinking, videography, graphic communication, design-thinking and virtual reality. In addition, the facilitator has completed more than 100 evaluation and research reports for a range of government, non-government organisations and community stakeholders including several peer-reviewed publications in 2018 incorporating transdisciplinary approaches.

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## Introduction to program logic and theory of change

presented by Carina Calzoni **FULL DAY | CATEGORY: A**

This workshop introduces the program logic/theory of change concept and lays out a step by step process for creating a logic/theory of change model. A program logic/ theory of change focuses not just on what, and how a project is trying to achieve change but also on 'the who' will be changing. The course includes discussion of how program logic / theory of change can be used for program design and how it can be used to provide the structure for monitoring and evaluation plans.

The course will commence with an overview of program logic / theory of change and a hands-on introduction to developing a simple hypothetical logic model. Following a more detailed overview of the various approaches to program logic development and their relative strengths, participants will be introduced to a structured process for developing a logic / theory of change, using a hypothetical behaviour change project.

The course will conclude with a bridging session that outlines the process for using program logic / theory of change to develop meaningful targets, monitoring systems and well-targeted evaluation plans. The training will include a mix of expert presentation, small group work, and questions and answer sessions.

**Carina Calzoni** is passionate about program design, monitoring and evaluation. She has nearly 20 years of professional evaluation experience within government and consulting to governments and not-for-profit organisation across a wide range of sectors and levels of complexity. She has an in-depth understanding of public policy and program design and management, and has a deep appreciation for a utilisation-focused approach to evaluation in this context.

Carina has a Masters in Evaluation as well as qualifications in Public Policy and Applied Science which gives her the breadth of skills and knowledge to work adaptively across a range of specialist fields. She has been involved in a large number of complex evaluations involving both qualitative and quantitative methods and program planning processes across a wide range of sectors including agriculture, natural resource management, regional development, education, health, mental health and social enterprises. She is also an experienced monitoring and evaluation trainer and facilitator

## Out of the program box: Evaluating place-based and systems change approaches

presented by Jess Dart **FULL DAY | CATEGORY: B**

The world in which 'program evaluation' was born and crafted is shifting. To address 'wicked' challenges such as entrenched place-based disadvantage or climate change no one person, sector, or discipline can hope to achieve lasting change alone. There is an increasing call to move beyond traditional programmatic and sectoral approaches. More joined-up and long-term 'systems change' and 'place-based' initiatives are becoming more commonplace and receiving attention from Government, Philanthropy and the not-for-profit sector. Unsurprisingly, these non-programmatic approaches do not lend themselves to being evaluated using traditional program evaluation.

To kick this workshop off, we provide an overview of systems change and place-based approaches and then invite participants to explore the evaluation challenges for this type of work. Drawing on both international literature and practice we then explore emerging thinking and practical tools about more agile, adaptive and developmental evaluation that seems more suitable to these settings. We will share lessons about how to plan and phase evaluation in this context (learn about planning sprints, evaluation zones, loops and the cube!), as well as tips about applying evaluation in the initial years, middle years and final years of a place-based initiative.

This workshop is pitched at the intermediate level.

**Jess Dart** is the founder and CEO of Clear Horizon – an Australian-based specialist evaluation company. Receiving the 2018 award for outstanding contribution to evaluation from the Australian Evaluation Society (AES), Dr Jess Dart is a recognised leader with over 25 years experience in strategy, design and evaluation for organisations in Australia and overseas. She specialises in the evaluation of complex and emergent programs and approaches. As part of her PhD she tested the 'Most Significant Change Technique' in an Australian context and later co-authored the User Guide with Rick Davies, which is now translated into 12 different languages.

Jess is passionate about supporting communities to thrive, and believes that evaluation has a place to support communities achieve their shared agenda. Evaluation when done well, can help communities uncover what works and what does not, as well as telling the story of change and creating momentum and clarity.

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## Moving from evaluation to valuation

presented by Taimur Siddiqi, Arjun Ravi **FULL DAY | CATEGORY: C**

For evaluation to help strengthen the lives of individuals and communities, it has to provide the right information to the right people at the right time. All organisations, from the largest multinationals through to government departments down to volunteer run NGOs, have to constantly make investment decisions based on what they hope is the best information to deliver the greatest value for money, however that is defined. Most organisations do not have the resources to undertake detailed economic analyses and instead commission evaluations which quantify value for money in non-monetary terms. While understandable, this often means 'intangible' outcomes such as improving quality of life, reducing recidivism, or developing social networks are overlooked or relegated in decision making. It's essential that evaluation practice responds to this so that where appropriate, the full range of social, environmental and economic outcomes can be valued. One option is to blend traditional economic valuation techniques with in depth stakeholder engagement using Social Return on Investment (SROI). SROI is a leading, principles-based methodology for measuring and valuing the impact of programs, policies and organisations. By enabling tangible and intangible costs and benefits to be represented in a common unit (money), SROI allows evaluators and funded organisations to speak the language of funders while still 'valuing what matters'.

This interactive workshop will focus on how to apply an SROI analysis to value outcomes as part of ongoing monitoring and evaluation (M&E) activities and using M&E data. It will also encourage participants to consider the benefits and challenges of valuing outcomes. It will be based on peer learning, with a series of cooperative learning exercises and opportunities for group discussion. Participants will be asked to bring their own examples and provided with a take home Excel-based template and resources to assist them with their analyses.

The learning outcomes are:

- Ability to apply SROI techniques in your M&E work
- Use SROI principles to more critically interpret programs and make more effective funding decisions
- Ability to identify appropriate financial proxies for valuing outcomes
- How to interpret SROI ratios

This workshop enables participants to address the following AES domains of competence:

- Culture, Stakeholders and Context
- Research Methods and Systematic Inquiry
- Evaluation Activities

The workshop is delivered by a Social Value International accredited practitioner and trainer and designed for those with intermediate evaluation experience and an interest in quantifying and valuing the impact of programs.

**Taimur Siddiqi** is an experienced practitioner and trainer of the Social Return on Investment (SROI) methodology and has completed several SROI projects and delivered accredited training to over 100 individuals. Taimur has applied SROI valuation techniques as part of his role as an evaluation consultant working with a range of public sector, corporate and not-for-profit organisations. His project work has included a peer reviewed SROI analysis of Indigenous financial counselling; a cost effectiveness evaluation of a child protection community legal pilot and an extensive SROI research project for Foodbank Australia. Prior to co-founding The Incus Group, he spent four years with Net Balance where he eventually managed the \$2 million Social Impact business line. Taimur holds a Bachelor of Science and Master of Environment from the University of Melbourne.

**Arjun Ravi** is director of The Incus Group and an experienced impact measurement and evaluation professional with extensive experience advising clients in the corporate, not-for-profit and government sector. Prior to co-founding The Incus Group in 2015, he spent five years with Net Balance and later EY Australia building and establishing the social sustainability practice. His experience in impact measurement has involved leading innovative engagements seeking to measure, value and manage the often “intangible” impacts of organisations’ operations and investments. He is accredited by Social Value International as a Social Return on Investment (SROI) practitioner and is a licensed trainer of the SROI methodology and has trained hundreds of diverse participants worldwide. Some of his project highlights include working with Save the Children to forecast the social return of a suite of their child protection initiatives and determining the social value of providing improved transportation access to persons with a disability to advocate for greater funding. Arjun holds a Bachelor of Finance degree from the University of Illinois and a Master of International Development from Monash University.

### Questionnaire design: Asking the right questions

presented by Jasper Odgers, Klas Johansson **HALF DAY (MORNING) | CATEGORY: A**

This applied workshop is a practical forum to learn the fundamentals of good survey design through practice. It aligns to AES professional learning competency 4 ‘research methods and systematic inquiry’. It is designed for people who need to collect standardised satisfaction and outcomes data from clients or stakeholders as part of their professional practice, but have not had previous experience designing questionnaires. It is also suitable for funders of evaluation and research to understand what constitutes good practice when asked to review survey instruments as part of managing the contract for an evaluation.

The workshop covers what is needed to make a good survey – from using a survey to ask the right questions, approaches to sampling, scale design, question wording, options for distribution, implications for analysis and reporting techniques.

The learning objectives are for participants to:

- Understand situations suited to different survey methods
- Identify appropriate survey methods for your project
- Understand approaches to sampling and their strengths and weaknesses
- Understand implications of design choices for analysis
- Have a basic understanding of reliability and validity
- Understand different types of scales and when to use them
- Design appropriate scales
- Identify and avoid common question design errors
- Understand processes to refine questionnaires
- Consider survey distribution channels and their strengths

The workshop uses applied techniques to support adult learning – outlining the theory, bringing this to life through participant discussion of how this fits with their project and practice-based examples (e.g. correcting poorly worded questions and picking up problems with scales). We ask participants to provide survey instruments or information about their project ahead of time, so we can deliver to their context. Participants also receive a workbook with more detailed notes to take away and reflect on, including a list top tips to avoid in question construction. This allows more time for practical skills building exercises in the workshop.

**Jasper Odgers** has been studying and working in quantitative research and data analysis for the past eight years. He manages online surveys, quantitative data analysis and data visualisation for ARTD's reporting. He has recently managed the Queensland Government's renting reform consultation which collected over 200,000 responses. Using digital engagement strategies to increase response rates and factor analysis to fine tune instruments, Jasper has successfully delivered stakeholder surveys for NSW and Commonwealth departments over the last five years.

**Klas Johansson** has extensive experience in research and evaluation and specialist expertise in the design, testing and implementation of monitoring systems. He specialises in research-oriented data collection systems and is a leader in the field of online monitoring and reporting for grants programs. With his background in evaluation and extensive experience working with a range of stakeholders to collect and report performance and monitoring data, Klas is adept at balancing the theoretical, technical and practical requirements for data systems. Klas has designed and implemented monitoring systems for Commonwealth Government and NSW Government programs, including grants programs, in a range of policy sectors. Klas was the recipient of the 2010 Best Evaluation Policy and System Award from the Australasian Evaluation Society for a monitoring and reporting system tracking the outcomes for children with a disability transitioning from school.

## Applying implementation science to evaluation: An introduction to implementation evaluation

presented by Jessica Hateley-Browne, Vanessa Rose **HALF DAY (AFTERNOON) | CATEGORY: A**

Implementation science is increasingly being used by government and other agencies to enhance the effectiveness of programs and these organisations are looking to evaluators to measure the effectiveness of their implementation efforts. The purpose of this workshop is to provide policy-makers, program managers and program evaluators with an introduction to key implementation science concepts and evaluation frameworks, methodologies and tools for measuring implementation effectiveness.

By the end of the workshop participants will be able to:

- Understand key implementation science concepts and strategies relevant to evaluations
- Understand frameworks and methodologies for implementation evaluation and differentiate these from process evaluation
- Apply these frameworks to common evaluation situations
- Gain awareness of the range of implementation evaluation measurement tools
- Consider how these concepts and frameworks could apply in their work

The presenters will use an approach to teaching and learning based on a common teaching and learning cycle:

- Connect (e.g. engaging with participants and their learning needs)
- Activate (e.g. introducing new content)
- Demonstrate (e.g. participants applying new content to scenarios)
- Consolidate (e.g. participants reflect on what was learned during the session and how it will be used in the workplace)
- Consistent with principles of adult learning we will place particular emphasis on participant reflections of how this content can apply to their work.

**Jessica Hateley-Browne**, PhD, is a researcher with a background in health psychology. She has more than 10 years of experience in applied behavioural research, particularly in the health services and population health fields. She has held roles in academic and applied research centres, and in a government agency. Jessica has worked on a variety of large-scale trials and evaluation projects, and has expertise in using mixed-methods and hybrid designs in research that seeks to address health and social program and policy challenges. She recently completed a first of its kind implementation evaluation of evidence-based programs in the child and family services sector in Victoria. Jessica is committed to high-quality and creative knowledge translation, and is passionate about contributing to and utilising the best evidence to inform policy and practice.

**Vanessa Rose**, PhD, is a research psychologist with substantial experience developing and evaluating evidence-based programs implemented within health and human services. She previously led a program of work at the University of NSW focused on improving the lives of children, families and communities facing adversity, establishing a community-based research centre to bridge the gap between research-practice and research-users. Vanessa has also led work in NSW government developing an evidence-informed framework to establish shared outcomes across agencies and improve the wellbeing of vulnerable populations. Her background includes child psychological assessment, managing a community health centre and teaching undergraduate and postgraduate students in health inequalities, health promotion and research methodology. In her role with CEI, Vanessa is responsible for a portfolio of evaluation projects. These include large-scale, whole-sector evaluations using robust methodologies to measure outcomes and assist government and other policy agencies in decision-making for future investment.

## REGISTRATION DETAILS

### Registration fees (inc GST)

Category	Half-day workshop	Full-day workshop
Member	A\$231 Early Bird* / A\$260	A\$440 Early Bird* / A\$484
Non Member	A\$396 Early Bird* / A\$450	A\$605 Early Bird* / A\$665
Student	A\$198 Early Bird* / A\$230	A\$303 Early Bird* / A\$350

\*Early Bird rates until 5 July

*It is important that you read the registration information below before completing the online form.*

### Registration process

Please register via the conference/conference workshop registration portal - see link below.

**Choose the number of workshop tickets you need in each category**, fill in the form and click 'Next'. You will be able to enter the workshop participant information for each ticket. On the next screen choose which workshop each participant wishes to attend.

**If you have already registered for the Conference**, follow the steps above and ignore the options for Conference tickets shown. You will be issued an additional invoice for the pre-conference workshops; your existing Conference registration details will not be affected.

**If you wish to register for the conference workshops only**, ignore the options for Conference tickets shown.

**If you wish to register for both the conference workshops and the Conference**, follow the instructions above for the conference workshop registration, and then, additionally, choose your Conference options.

### Important information regarding your conference workshop registration

- 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.
- Students must provide a copy of their full-time student identification card/number or a supporting note from their Head of Department upon registration which can be faxed to +61 3 8344 8490 or scanned and forwarded by email to [conference@aes.asn.au](mailto:conference@aes.asn.au). Without this information, the full registration fee will be charged.
- Your AES Membership number: If you do not remember your AES Membership number, please go to the AES website and log-in, your member number should appear in the right hand column, otherwise go to the instructions page.
- Organisational members: Staff of Organisational Members receive an additional 10% off the appropriate registration fee by using the correct code (either member or non-member). The code has been sent to the main contact for the Organisational Membership. If you are a staff member of an Organisational Member, please ask your organisation for the code so that you can use it when registering.

### Terms and conditions of registration

Please read the terms and conditions for conference workshop/conference registration available [here](#).

### Looking for accommodation?

A range of accommodation options are available [here](#).

