

The EnCompass Learning Center



COURSE CATALOG

2024-2025

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Evidence.

Engagement.

Learning.


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ELC Course Descriptions

Thank you for your interest in the EnCompass Learning Center's course offerings! Classes will take place online via Adobe Connect or Zoom. Participants who complete all the modules will each receive a certificate of completion at the end of the course. Please contact us with any questions at learningcenter@encompassworld.com.

Learning & Leadership Development

Leading Effective Virtual Teams

Instructor: John Hovell, PMP, CKM, CEO and co-founder of STRATactical

Description: Organizations thrive when team members work well together, and in today's increasingly distributed workforce, it is more important than ever for team leaders and project managers to know how to maximize the effectiveness of virtual teams. This course will show participants how to value and build effective virtual teams. We will cover aspects of culture, process, and technology, and participants will have the opportunity to apply the concepts through experiential exercises. Participants will leave the course with concrete ideas for making their own teams more effective! Participants receive extensive materials for reference and future use.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Building a strong virtual team

In work and in life, we are constantly working alongside others to accomplish our goals. In this module, participants will explore how teams differ from groups and think about the hallmarks of effective teams. We will explore additional competencies we need as leaders in the virtual environment. Participants will then engage in an immersive exercise that will show firsthand the complications and challenges that can arise in virtual team engagement. Module 1 will end with an exploration

of the team coaching model and a review of what high productivity and high functionality look like in teams.

MODULE 2: Leading the Way

In Module 2, participants will learn about the Six Change Dial framework for managing virtual teams and explore the application of lessons learned through a liberating structure exercise. We will discuss the role that technology plays in virtual engagements and participate in an action learning set to demonstrate how teams can problem solve together in a virtual setting and establish accountability structures. Participants will end the course having had ample opportunities to reflect on what it takes to manage effective virtual teams and having participated in a series of immersive exercises and processes that they can take back to use with their own teams at work!

Managing Conflict

Instructor: Wendy Swire, MA, PCC, Founder of Swire Solutions LLC

Description: Conflict can be a healthy and natural part of interpersonal relationships, and yet it is often mismanaged. This can lead to discontent and even dysfunction. In this one-module course, participants will learn how to manage conflict by applying foundational conflict resolution skills they can use with stakeholders, team members, and in other interpersonal situations. Participants will learn about the different types of conflict and can explore their own conflict resolution strengths by taking an online self-assessment. The instructor will help participants explore essential conflict communication techniques, common cognitive biases in conflict, and ways to apply what they have learned to better engage with others in work settings. In addition, the course will highlight the nuances of managing conflict in remote work settings and suggest ways to use technology to support proactive and effective conflict resolution. Case studies and real-world examples will showcase how to apply the content covered in the course.

Please note that participants will be asked to complete a

short reading assignment in advance of the program.

This course is delivered in one virtual, instructor-led module.

Managing Difficult Conversations

Instructor: Wendy Swire, MA, PCC, Founder of Swire Solutions LLC

Description: Understanding how to manage difficult conversations is essential when presenting negative findings, providing critical feedback, addressing controversial issues, delivering tough messages, and working with difficult stakeholders or team members. Interpersonal communication and conflict resolution is at the heart of effective work, so while we usually think of “managing difficult conversations” as a skill needed by supervisors and managers, in fact, it is something we all need to learn how to do.

In this highly interactive session, participants will learn practical and actionable techniques to better approach the delivery of negative findings, manage difficult stakeholders, and navigate controversial situations. This course is ideal for program managers, evaluators, research and social scientists, technical assistance providers, and more.

Participants will get to take (and debrief the results of) a self-assessment to learn about their own conversation and communication style preferences. Presentations and applied case studies/conversation scenarios will help learners identify:

The three levels of conversations, with particular focus on difficult conversations (facts, ego, identity) and how they show up in evaluation and non-evaluation work context

- Top techniques to make and manage difficult conversations (third story, contribution system, others) to better engage stakeholders
- Application to evaluation context
- Managing Difficult Conversations is delivered in one virtual instructor-led module and includes role-play and pair practice of real difficult conversations. Participants who successfully complete the course will receive a certificate of completion.

This course is delivered in one virtual, instructor-led module.

Talk Like Ted

Instructor: Mike Myers, MEd, Associate Director of Digital Learning at EnCompass LLC

Description: “TED Talks have redefined the elements of a successful presentation and become the gold standard for public speaking,” writes Carmine Gallo, author of Talk Like TED: The 9 Public Speaking Secrets of the World’s Top Minds. This course is an opportunity for participants to learn and practice those nine techniques by creating and delivering a TED-style presentation on a topic of their choosing. This course helps individuals create and deliver more compelling presentations, teams strengthen relationships by learning about and from each other, and organizations challenge ineffective presentation norms.

After actively participating in this course, participants will be able to:

- Describe the nine effective TED Talk presentation techniques
- Storyboard a presentation using the “what is, what could be” presentation structure
- Deliver a presentation that is novel, memorable, and emotionally engaging

This course is delivered in three virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: From the Head to the Page

In the first session, participants learn the nine techniques that make TED Talks memorable, novel, and emotionally engaging. Then they learn how to structure a presentation that effectively conveys a relatable and persuasive message. After watching a TED Talk to observe how these principles and structure are applied in a presentation, participants are guided through brainstorming and storyboarding their own TED-style presentations to get their ideas out of their heads and onto the page. Participants will receive a worksheet at the end of this session to assist them in storyboarding their presentation before the second session.

MODULE 2: From the Page to the Stage

In the second session, participants learn effective ways to open and close a TED-style presentation and continue storyboarding their presentations using these techniques. They will learn tips for public speaking in virtual and in-person settings, managing anxiety, and using visual aids effectively. This session prepares

participants to effectively deliver their presentations on the stage. Participants are encouraged to finalize their plans and practice their presentations before the third session.

MODULE 3: Delivering Your Presentation

In the third session, each participant will deliver their presentation and receive constructive feedback from the instructor and other participants. A recording of the presentation is made available so each participant can observe themselves and note areas for improvement.

Monitoring & Evaluation

Appreciative Evaluation

Instructor: Tessie Catsambas, MPP, Co-founder of EnCompass LLC, CEO/CFO

Description: The Appreciative Evaluation course will demonstrate how to incorporate Appreciative Inquiry into evaluation, including an exploration of the research behind appreciative inquiry, recent developments in positive psychology, and the ways in which an appreciative lens can drive the development of indicators, data collection instruments, analysis and reporting.

This course is delivered in four virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Overview of Appreciative Evaluation

Appreciative Inquiry is an organizational development methodology that searches for what is best in people and in organizations. The application of Appreciative Inquiry to the practice of evaluation incorporates the systematic and participatory study of successful experiences into the evaluation. Appreciative Inquiry has the power to energize and excite stakeholders, to move people from a deficit-focused lens to one that builds on assets and seeks ever better outcomes. In this module, participants will learn about Appreciative Inquiry, its key concepts, core principles and underlying assumptions. They will explore the Appreciative Inquiry models and engage in an experiential case study to connect Appreciative Inquiry to evaluation, practice the first two phases of

Appreciative Inquiry, as well as explore the benefits and the challenges of applying AI to evaluations.

MODULE 2: Appreciative Evaluation Design: Focusing the Evaluation and Organizing Data Collection

The application of Appreciative Evaluation begins at the launch of the evaluation, and weaves through to data collection, analysis and report writing. In this module, participants will practice the third phase of Appreciative Inquiry, and explore how Appreciative Evaluation can be used to focus the evaluation and organize data collection. In this module, participants use an appreciative process to develop evaluation questions and indicators. Through small group work and case studies, participants will practice developing appreciative indicators, and learn how to reframe traditional indicators into appreciative ones.



MODULE 3: Appreciative Data Collection

Data collection is key to capturing the qualitative and quantitative measures that inform our evaluations. In this module, participants will learn how to design appreciative data collection instruments, including interview guides, focus group protocols and surveys/questionnaires. Participants will explore the nature of appreciative questions, the structure of the appreciative process, the role of appreciative evaluation and managing resistance, and key competencies needed in appreciative evaluation. Through small group work, participants will have the opportunity to practice

conducting appreciative interviews and will reflect on the kinds of data that emerge when appreciative approaches are used.

MODULE 4: Data Analysis and Appreciative Reporting

The application of Appreciative Inquiry in evaluation results in a positive evaluation experience, and learning through the process of evaluation. In addition to the learning that takes place in data collection, the analysis and reporting and critical times when evaluations need to demonstrate respect for the data they have collected, and maintain an appreciative lens in data analysis and triangulation. In this module, participants will learn how to interpret and analyze the outputs from appreciative data collection instruments, but also how to use an appreciative lens to analyze data collected without it. Participants will then explore appreciative strategies for presenting data in an evaluation including in conveying difficult messages about things that do not work, and identifying areas for improvement. Participants will get a chance to hone their appreciative reporting skills and will see examples of appreciative reporting that may inspire their own evaluation practice.

Recommended Text

Reframing Evaluation Through Appreciative Inquiry

To accommodate participants' budgets and preferred reading format, we do not insist that recommended or required texts be purchased through the EnCompass Learning Center. Participants can choose to purchase new, used, or electronic versions of textbooks depending on their needs. Please note that we have no preferred vendor, and that the link on our website is only provided for convenience and is not meant as an endorsement of any kind. As such, the ELC will not be responsible for any issues that arise related to textbooks purchases and we will not issue any course refunds or vouchers due to textbook related issues.

Artificial Intelligence (AI) Policies and Responsible Use of AI in Evaluation

Instructors: Zach Tilton, MA, Evaluation Specialist with The MERL Tech Initiative and Linda Raftree, CIPP & CIPM, Founder of The MERL Tech Initiative

Description: Organizations are increasingly being asked to use artificial intelligence (AI) to enhance their

evaluation practices. To guide employees in leveraging these new technologies, organizations must develop AI policies to clarify what is and is not allowable and what ethical considerations must be taken into account to ensure its responsible use. In this course, participants will learn about the principles of AI-enabled evaluation and how to develop an AI Policy to guide their work. They will review sample policies, consider what should and should not be included in a policy, and learn about best practices in launching an AI Policy and overseeing compliance.

By the end of the course, participants will be well-equipped to develop or enhance their organizations' AI policies, helping ensure that the strategies are ethical, effective, aligned with their organizational goals, and will ultimately drive significant improvements in program outcomes and operational efficiency.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: The Case for AI-enabled Evaluation and Responsible Use

This module sets the stage for understanding the role AI can play in evaluation and the need for organizations to develop AI policies that encourage responsible use. The course starts with a foundational look at what AI-enabled evaluation entails. Participants will assess their current familiarity with the application of AI in evaluation and gain an overview of the state of the field. The module covers essential topics such as the ethical considerations of using AI in evaluation, principles of critical AI literacy, and the competencies needed for AI-literate evaluators and elements of AI-enabled evaluation functions. It concludes with an interactive Q&A session to discuss specific organizational needs and AI's potential applications in monitoring, evaluation, research, and learning (MERL).

MODULE 2: Getting Started with an AI Policy

The session begins with an introduction to organizational AI-enabled evaluability, using capacity assessments to identify organizational pain points, and exploring enablers and barriers to AI adoption. Participants will learn the steps involved in developing an AI-enabled evaluation policy using an asset-based, principles-focused approach, and how to manage AI-enabled evaluation tasks with a comprehensive checklist.

Examples of policies and small-group work will help participants think through the design and development of AI policies that will support the evaluation life cycle, including inception, data collection, data analysis, and reporting. The instructors will touch on best practices related to launching a policy and overseeing compliance, and conclude with a segment on the role of meta-evaluation in supporting quality assurance.

Being an Evaluator: A Journey into the World of Evaluation Practice

Instructor: Donna Podems, PhD, Founder and Director of OtherWISE consulting

Description: Are you new to the field of evaluation? Are you wondering what it's all about? Will you be commissioning an evaluation? This course will demystify the evaluation journey and explore the choices, roles and challenges that evaluators must navigate in the real world. Join us for a two-module course designed to help explore the world of evaluation practice. Case studies, exercises and small group conversations will help participants learn how to clarify interventions, identify beneficiaries, gather data, discuss results, and develop recommendations, all the while fostering a reflective, ethical and culturally sensitive evaluation practice.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Evaluation 101

In this first module we will review monitoring and evaluation terminology, distinguish between evaluation and research, sort out the problem statement, recognizing its importance in the whole evaluation journey, and think about stakeholders, who they are and why they matter? We will explore the difference between facts and assumptions, look at methods of inquiry and think about what it means to have credible data, credible evidence, and credible evaluations. We will wrap up by illustrating how to make an intervention evaluable by linking a problem statement with an intervention and results. Participants will explore how to break down results so that they are assessable and measurable and recognize the importance of having a program logic model and theory of change be explicit and go hand in hand.

MODULE 2: The Maze of Evaluation Choices

This module will start with reviewing a program's theory of change and exploring how to identify what to assess and when. Through an interactive activity, participants will walk through a sample evaluation design. We will consider how to engage with values, and values are embedded in every aspect of the evaluative process, and how participants in the process can have different values. We will talk about the multitude of choices that an evaluator must make to provide the most accurate, feasible, credible and useful evaluation to specific users, at that time, for that intervention, in that context, and with those resources. We will wrap up by learning about evaluation reports and think about how to provide specific and actionable recommendations. Don't be surprised if you learn some evaluation trade secrets along the way!

Recommended Text

Being an Evaluator: Your Practical Guide to Evaluation

To accommodate participants' budgets and preferred reading format, we do not insist that recommended or required texts be purchased through the EnCompass Learning Center. Participants can choose to purchase new, used, or electronic versions of textbooks depending on their needs. Please note that we have no preferred vendor, and that the link on our website is only provided for convenience and is not meant as an endorsement of any kind. As such, the ELC will not be responsible for any issues that arise related to textbooks purchases and we will not issue any course refunds or vouchers due to textbook related issues.



Blended Evaluation: How to Weave Together Frameworks to Optimize Evaluation Design

Instructor: Bianca Montrosse-Moorhead, PhD, Associate Professor of Research Methods, Measurement, and Evaluation at the University of Connecticut

Description: Can evaluation frameworks be successfully combined? Can Theory-Driven Evaluation be used with Appreciative Inquiry? Is it possible for Experimental Design Evaluation and Culturally Responsive Evaluation to be used in tandem? Evaluators often feel constrained by using just one framework, yet there is little practical guidance on how to bring multiple frameworks together.

In this course with Bianca Montrosse-Moorhead, participants will learn about framework weaving and how it relates to evaluation models, theories, approaches, and methods. They will (1) investigate various framework-weaving options, (2) explore a case study that shows how frameworks can be blended in practice, and (3) apply what they have learned to weaving frameworks together. Challenge questions we will explore throughout the course include:

- What is framework weaving and how does it relate to existing evaluation models, theories, approaches, and methods?
- What are examples of framework weaving in practice? How do they enhance an evaluation's quality, coherence, relevance, and usefulness?

- What process can you use to intentionally weave together or blend practice frameworks? What challenges can arise and how can you address them?

This course is delivered in three interactive modules. Read more about each of the modules below.

MODULE 1: The Value of Blending Approaches and Frameworks

It is a globally accepted standard that evaluators should understand and be able to use different evaluation approaches and frameworks, but sometimes knowing how to effectively blend different models is challenging. In Module 1, participants will:

- Compare use cases for different frameworks and identify the common themes that make them a success
- Identify which frameworks complement each other and how they are grouped
- Recognize the value of blended designs at different parts of the evaluation process/life cycle

MODULE 2: A Deep Dive on Blended Approaches

Evaluation practitioners often wonder whether different practice frameworks can be used together and wish they had a practical way to think about how to combine them. The exciting news is that frameworks can be combined and there are many examples to turn to for inspiration. In Module 2, participants will engage in a variety of activities to:

- Explore a real-life example of blending frameworks through a case study
- Practice constructing an evaluation plan that blends frameworks together
- Begin to critically reflect on the quality of blended plans

MODULE 3: Applying Blended Approaches to Your Work

In Modules 1 and 2, participants develop an understanding of what is possible with blended evaluation designs and explore different examples of successful practice. However, being able to use blended frameworks requires practice. Module 3 will focus on application. Through a mix of hands-on activities and individual and small-group work, participants will:

- Draft, present, and get feedback on a blended evaluation plan for one of their evaluation projects

- Recognize and be able to address common challenges that arise during the blending process
- Understand best practice in framework blending and be able to put this knowledge to use

Data Quality Fundamentals

Instructor: **Mary Pat Selvaggio**, MPH, Director of Health and Research, Khulisa Management Services' and **Kris Eale**, MPH, Senior Public Health Manager, Founder, ConsultHuntLink group

Description: Data is a critical asset for any program, organization, or business. Poor-quality data degrades knowledge, leading to negative consequences in understanding of the world, situations, systems, or events, and poor decision making that negatively affects all aspects of life (health, social, economics, etc.).

Various factors influence data quality, and shortcomings in these factors will contribute to poor-quality data. As M&E practitioners, we must ensure that data collected is of the highest possible quality—whether in routine monitoring or in evaluations—so that follow-on actions and decisions based on the data are true and correct.

This three-module course will introduce participants to core concepts of data quality and how to structure data management systems for collecting and reporting data, as well how to assess the quality of data collected and reported.

At the end of this course, participants should understand:

- Why data quality is important
- The concepts and terminologies used in data quality
- The elements of strong data management systems to enhance data quality
- The components, tools, and processes of a Data Quality Assessment/Audit

This course is intended for:

- Researchers and evaluators
- Program Managers
- M&E Managers
- Any persons working with data

This course is delivered in three virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Introduction to Data Quality

This module presents the rationale for enhancing data quality, and introduces core data quality terminology and criteria, and common data quality issues and risks.

MODULE 2: Data Management Systems

The second module focuses on the data management systems (DMS) that produce and report data. We will discuss how to structure the DMS for routine reporting and research/evaluation to enhance data quality. We will look at data management concepts and best practices, and introduce approaches to correcting errors in M&E data sets.

MODULE 3: Data Quality Assessments/Audit (DQAs)

The final module presents the methodology for data quality assessments/audits (DQAs) – whether internal or external – including how to verify the accuracy/precision of data and how to assess the data management system for structural risks that may compromise data quality.

Data Storytelling

Instructor: **Andy Krackov**, MA, President of Hillcrest Advisory

Description: Our brains are wired for stories. Therefore, the stories we integrate with our data can create more actionable information. Before writing another traditional 20 (or 50) page evaluation report, put on your communication and data storytelling hat, and join us for this online learning program that will teach you how to transform data and findings into visual stories that are cogent, engaging, and true to your analysis.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Effective Data Storytelling

In this first module, participants will learn the key ingredients that go into effective data storytelling:

- How to narrow down to the needs of a specific audience and fine-tune to just one action
- How to walk in the shoes of an audience so you can craft messaging and develop presentation formats suited to their needs
- The craft of creating compelling and to-the-point graphs and maps

- How to organize findings into smaller bits of information so that you don't overwhelm your readers with everything you know, all at once

Participants will get an overview of lessons learned from effective data storytelling and will explore the many formats that can be used, from slideshows to personal and persuasive narratives and highly visual infographics.

MODULE 2: Crafting Your Story

The best ways to master data storytelling is to try it out and to learn from peers. Between the two modules, each participant will sketch out (on paper) one or two ways to present findings for an evaluation or report that they are working on. The sketches can be rudimentary, conveying the germ of an idea rather than a fully fleshed out concept. Then, in Module 2, participants will engage in a story "swap meet," where each attendee will share their ideas and get input from others. The instructor will also offer input by asking questions that draw upon lessons from module one. In the end, each attendee will have the feedback needed to create a data story that is immediately relevant to their work.

Equity-Focused and Culturally Responsive Evaluation

Instructor: Ayesha S. Boyce, PhD, Associate Professor in the Division of Educational Leadership and Innovation at Arizona State University

Description: In this three-module course, the focus will be on equity-focused and culturally responsive approaches to evaluation and research, and a combination of both theoretical and practical applications. The course will locate social inquiry as a key cultural product and provide a background and description for approaches that are considered culturally responsive. We will also discuss our own cultural location as researchers, as well as key dimensions of practice (e.g., context, relationships, validity, methodology, design, and reporting).

This course is delivered in three virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Overview and Theoretical Foundations

This module begins with the justification and rationale for the utilization of equity-focused and culturally responsive evaluation approaches. The instructor will overview the relationship between axiology, ontology, epistemology,

methodology, and evaluation approaches and theories. Then, participants will work to understand the relationship between their own experiences, culture, education, and background and their practice. The extent to which all social inquiry products are steeped in culture will be discussed.

MODULE 2: Applying Equity-Focused and Culturally Responsive Evaluation in Practice I

In this module, participants will learn how to informally engage with culture, equity, diversity, and inclusion in evaluation settings. They will then work through the practical aspects of developing stakeholder relationships, logic modeling, and developing evaluation questions with an equity-focused and culturally responsive evaluation lens.

MODULE 3: Applying Equity-Focused and Culturally Responsive Evaluation in Practice II

In this module, participants will learn how to develop instruments, data analysis, and reporting with an equity-focused and culturally responsive evaluation lens.

Equity and Social Justice Assessment and Evaluation

Instructor: Khalil Bitar, MSc, Evaluator, Researcher, and M&E Specialist

Description: Increasingly, implementers have to speak to the ways in which their interventions are addressing equity and social justice issues, requiring both an assessment of past and present practices, processes, and results and a vision for how to do more in the future.

Given their role, expected contribution, and training, evaluators are well positioned to gather the evidence on how implementers are addressing these issues and to share results. However, evaluators often lack the tools to systematically assess and evaluate equity and social justice in diverse contexts and at different phases of the intervention (and evaluation).

This course will provide practical tips and tools that evaluators need to do this essential work! Participants will:

- Develop an understanding of the complex but essential topic of equity and social justice considerations in the evaluation field
- Gain concrete tools to tackle these issues more systematically and successfully in their practice.

This course is ideal for people working at the intersection of evaluation and social justice and for implementers who wish to understand what equity and social justice assessment entails. Classes will take place online via Zoom. Participants who successfully complete the course will receive a certificate of completion at the end of the course.

The course is delivered in two virtual instructor-led modules. Read more about each of the modules below.

MODULE 1: Equity and Social Justice in Evaluation Theory

In the first module, participants learn about the theories and approaches that focus on equity and social justice issues in the evaluation field. The module will cover:

- The conceptualization of “equity” and “social justice” as notions in the evaluation field
- Distinguishing equity and social justice from other relevant concepts (e.g., equality, diversity, inclusion, participation, and empowerment)
- Evaluation theory and equity and social justice
- Evaluation theories and approaches that tackle equity and social justice issues

MODULE 2: Equity and Social Justice in Evaluation Practice

In the second module, participants will learn how to use tools to provide sound evaluative evidence about equity and social justice practices, processes, and results. This module will cover:

- Understanding the multiple issues and aspects of equity and social justice
- Evaluation tools for equity and social justice assessment and evaluation
- Considering equity and social justice in different contexts, including in complex settings, and different stages of the evaluation process
- Putting equity and social justice assessment and evaluation tools to use.

Evaluating Training Programs

Instructor: **Asma M. Ali**, PhD, Principal Consultant at AA & Associates, LLC

Description: How do we know if our training programs are effective? How can we determine if they are achieving their intended results? In this course, participants will learn how to translate intended outcomes of training programs into measurable objectives that are evaluable. Participants will also delve into several common frameworks for evaluating training programs, including Kirkpatrick’s New World model, the Concerns-Based Adoption model, Moore’s model, and the social-ecological model. Through homework and in class activities, participants will have a chance to develop an evaluation plan for a training program they are evaluating at work. The interactive sessions will include learning from other trainees as well as large group interactions where the instructor will ask questions and provide feedback to further learning opportunities.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Developing Evaluable Objectives

In this first module, participants will learn how to identify the goals of a training program and develop evaluable objectives for the training. Specifically, participants will learn to:

- Identify the purpose and utility of training programs
- Recognize the needs of different training program stakeholders, including commissioners and participants
- Develop SMART learning objectives (Specific, Measurable, Attainable, Relevant, and Time-Bound) to measure the intended outcomes (i.e., knowledge, skill, values, attitudinal changes) of learning programs

Homework between the two modules will include a short (one-paragraph) overview of a training program participants wish to evaluate, including the purpose of the training, the relevant stakeholders and their needs, and specific learning objectives.

MODULE 2: Developing Your Training Evaluation Plan

Building out an evaluation for a training program includes selecting an appropriate model for your program. In Module 2, participants will build on what

they learned about learning objectives in Module 1 and explore different training evaluation frameworks, including Kirkpatrick's New World model, the Concerns-Based Adoption model, Moore's model, and the social-ecological model. Participants will work together to develop an evaluation plan for a training program. After going through the process once as a group, participants will have the opportunity to select a training evaluation framework appropriate for the program they worked on as part of their homework and to develop a high-level evaluation plan of their own.

Evaluation Briefers: Short-Reports Designed for Utilization

Instructor: Crystal Cason, MA, Senior Communications Specialist at EnCompass LLC

Description: The long, detailed reports often required by commissioners do little to encourage the utilization of evaluation results. Evaluation briefers, by contrast, are short, stand-alone reports designed to maximize exposure, readership, and, most importantly, use of evaluation results. Because the briefer pulls existing content from the longer, client-mandated report, development is relatively quick and incurs minimal additional expense. In this two-module course, participants will learn the essential components of a briefer, and how to build a briefer from an existing evaluation report of their own.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: The Beauty in the Briefer

Briefers provide concise, data-rich, and highly visual summaries of evaluation results. They extract key points to help busy stakeholders focus on big-picture implications and provide a bridge that encourages them to engage with the full report. In this module, participants will explore the essential elements of a briefer, including key components of layout, content, and visualization. They will review multiple examples and have the opportunity to walk through each step of building a briefer from an evaluation report. For homework after module 1, participants will be asked to bring an evaluation report to module 2 that they will use to develop their own briefers.

MODULE 2: Building Your Own Briefer

In module 2, participants will build their own briefers using an evaluation report of their choosing or one provided by the instructor. The instructor will lead participants through a step-by-step process that begins with identifying key elements from the evaluation report that will be included in the briefer, and then works through the layout and design elements that drive understanding and uptake of the evaluation results. At the end of this hands-on, practical visualization course, participants will have a new tool in their evaluation-reporting toolkit.

Evaluation Management

Instructor: Tessie Catsambas, MPP, Co-founder of EnCompass LLC, CEO/CFO

Description: The purpose of this course is to provide new and experienced evaluation professionals and funders with strategies, tools, and skills to: (1) develop realistic evaluation plans, (2) negotiate needed adjustments when issues arise, (3) organize and manage evaluation teams, (4) monitor evaluation activities and budgets, (5) protect evaluation independence and rigor while responding to client needs, and (6) ensure the quality of evaluation products and briefings.

Evaluation managers have a complex job. Against a backdrop of demanding technical requirements and a dynamic political environment, the goal of evaluation management is to develop, with available resources and time, valid and useful measurement information and findings, and ensure the quality of the process, products, and services included in the evaluation contract. Management decisions influence methodological decisions and vice versa, as method choice has cost implications.

The course methodology will be experiential and didactic, drawing on participants' experience and engaging them with diverse material. It will include assessments, quizzes, games, checklists, case examples, access to a curated site of readings, and tools. At the end of this training, participants will have a comprehensive view of evaluation management, and will be prepared to follow a systematic process for commissioning and managing evaluations. They will receive guidance and tools to support each evaluation management activity, and be able to identify areas where they need further development. Ultimately, they will feel more confident to

lead evaluation teams and negotiate with clients and evaluators for better evaluations.

This course is delivered in four virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: The Role of an Evaluation Manager

This introductory module has two parts. In the first part, we will clarify the role of the evaluation manager(s), the criteria we use to assess effective evaluation management, and the competencies required in evaluation management. This will ground the areas of emphasis in the overall course.

In the second part, we will use a case example and dive into a skills-focused section on conducting evaluation contracts including task analysis, staffing, and budgeting.

MODULE 2: The Importance of Context and Planning

In this module, we will explore the client-evaluator relationship, and discuss how to make it a successful one in different types of evaluation commissioner environments (U.S. Government, United Nations, foundations, etc.). We will review the authority and limitations of each party, and explore how to partner while staying independent in that important relationship. Internal evaluators deal with issues of authority and independence differently, thus this section is also relevant to them.

We will then move to the role of the manager in evaluation planning: context, vision for the evaluation, mastering logistics, and the outputs of evaluation planning. We will focus on the role of the evaluation manager regardless of evaluation design, but will refer different designs and how some designs add complexity to evaluation management.

We will end this module with a test on the content of the first two modules.

MODULE 3: Communications, Negotiations, and Relationship Management

In the first part of this module, we will explore the key management competency of communication, including how evaluation managers can build on their strengths to fulfill their communication and negotiation responsibilities.

In the second part of this module, we will explore the evaluation manager's responsibility to build and manage

an evaluation team, including team planning, supervision, negotiating, and managing stress.

This module will end with a test on the contents of the first three modules.

MODULE 4: Quality Control and Oversight

In the first part of this module, we will review how evaluation managers must fulfill their role of monitoring the implementation of an evaluation, from data collection to report writing. We will identify pause points and appropriate interventions for the evaluation manager, and discuss living in the nexus of fulfilling contract requirements, responding to client needs, and protecting independence.

In the second part of this module, we will play an evaluation management game that brings all of the concepts and skills of the course together.

Evaluation Planning—Setting the Stage for Successful Evaluations

Instructor: [Ayesha S. Boyce](#), PhD, Associate Professor in the Division of Educational Leadership and Innovation at Arizona State University

Description: Every evaluation effort, large or small, should start with a plan! Evaluation plans clarify desired outcomes and help ensure stakeholders are on the same page. In this course, participants will learn about the importance of good evaluation planning, what to include in an evaluation plan, and how to use a plan after it's been developed.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Laying out an Evaluation Plan

Evaluation plans explain what will be evaluated, why it matters, what questions will be asked, how data will be collected, and what reports or products will be produced. In this module, participants will learn about the importance of the evaluation plan, explore the various components involved in the plan, and practice using logic models to articulate an evaluation plan of action.

MODULE 2: Building an Evaluation Matrix

A key component of any evaluation plan is the Evaluation Matrix. In this module, participants will learn about evaluation frameworks/matrices and what they entail.

Through guided exercises, participants will have the opportunity to build evaluation matrices and think about how they tie into evaluation plans overall. By the end of this course, participants will be planning evaluations with confidence!

Facilitating Evaluation

Instructor: Michael Quinn Patton, PhD, Founder and Director of Utilization-Focused Evaluation

Description: Evaluation facilitation is a specialized niche within the larger world of facilitation. It applies and adapts general facilitation knowledge and techniques to the specialized challenges of working with stakeholder groups involved in program evaluation. The purpose of such facilitation is to enhance the relevance, credibility, meaningfulness, and utility of evaluations.

Evaluation facilitation falls within the Interpersonal Domain of the American Evaluation Association's competencies. This domain focuses on the human relations and social interactions that ground evaluator's effectiveness for professional practice. Interpersonal skills include cultural competence, communication, facilitation, and conflict resolution. This webinar will build skills in all of these interpersonal skills, with particular emphasis on facilitation as the bedrock of interpersonal evaluator competence. The interpersonally competent evaluation facilitator:

- Fosters positive relationships for professional practice and evaluation use
- Listens to understand and engage different perspectives
- Facilitates shared decision making for evaluation
- Builds trust throughout the evaluation
- Attends to the ways power and privilege affect evaluation practice
- Communicates in meaningful ways that enhance the effectiveness of the evaluation
- Facilitates constructive and culturally responsive interaction throughout the evaluation
- Manages conflicts constructively

(Source: AEA *Interpersonal Competencies*)

This course is delivered in four virtual, instructor-led modules. Read more about each of the modules below.



MODULE 1: Evaluation Facilitation Overview: Dimensions, Skills, and Steps

This opening module will cover the five generic steps in group facilitation as applied to evaluation. Questions for establishing facilitation parameters will flow from framing and clarifying roles, responsibilities, and power dynamics. To enhance evaluation use, facilitation involves being active–reactive–interactive–adaptive; we will cover and illustrate what this means and how to do it. A facilitator self-assessment will build the scaffolding for facilitation capacity building. We will provide and discuss examples. Participants will share their own experiences and issues. We will also highlight classic evaluation facilitation failures as opportunities for learning.

MODULE 2: Five Operating Principles for Evaluation Facilitation

This module will introduce, explain, and illustrate with examples the five fundamental evaluation facilitation principles:

1. Be guided by the personal factor.
2. Engage through options.
3. Observe, interpret, and adapt
4. Embed evaluative thinking in all aspects of the facilitation.
5. Invigorate with leading-edge inputs.

MODULE 3: Facilitation Issues and Adaptation

In this module, we will identify common facilitation challenges. Usual issues to be discussed include: building evaluation capacity; why and how less can be more; going slowly to go fast; being mindful throughout; treating whatever happens as data; adapting facilitation to what emerges; and exercising your authority sparingly, but forcefully.

MODULE 4: Facilitation Cases and Opportunities for Practice

This final module will use cases to illuminate facilitation techniques, tools, and processes. Facilitation is a skill that requires practice and participants will have the opportunity to put all that they have learned into action. Afterwards, participants will discuss their experiences, and the group will generate lessons and effective practices.

Required Text

Facilitating Evaluation: Principles in Practice

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Feminist Evaluation: Not your standard gender-responsive approach!

Instructor: Donna Podems, PhD, Founder and Director of OtherWISE consulting

Description: Feminist evaluation, like other evaluation approaches, is concerned with evaluating the effectiveness of programs, interventions, policies, and innovations to judge their merit and worth. In this 3-hour session, Donna Podems describes what Feminist Evaluation is and how it differs from mainstream approaches, including gender-responsive approaches; provides practical guidance on when and how Feminist

Evaluation can be integrated in an evaluation process or used on its own (and when it shouldn't be); and shares real examples of the exhilarations and exasperations of using Feminist Evaluation. Participants will engage in discussions that are essential when considering using this approach and apply what they learned to a real-world example.

This course is delivered in one virtual, instructor-led module.

Foundations in Data Visualization

Instructor: Crystal Cason, MA, Senior Communications Specialist at EnCompass LLC

Description: Presenting data effectively is key to communicating results. The good news is that being a data visualization whiz is easier than you think. By following a few basic tenants of good design, you too can make your data come to life. Join us for this two-module course to learn how to choose the right chart and then use elements including color, type, text, and more to make your data easier to understand. Participants will have the opportunity to put their learning into action and will emerge from this course with the confidence and skills to take their reports and presentations to the next level.

This course is delivered in two virtual, instructor-led modules.

MODULE 1: Understanding the Basics

In module one, participants will cover best practices in data visualization. They will explore examples of good and bad visualizations and learn the keys to success, including identifying your audience, articulating your purpose, choosing the right format, and polishing your design using best practices related to color, text, graphics, and layout.

MODULE 2: Building Better Charts and Graphs

In module two, participants will get hands-on practice in building better charts and graphs. Participants will begin with an interactive exercise on the basics of good design. Then through a series of small group and individual exercises, participants will put their learning into practice. Participants are encouraged to use a laptop loaded with Excel and to bring a data set they wish to visualize. Those who do not have Excel or a data set

handy will be able to practice good design by sketching with paper and pen.



From Default to Dazzling: Creating Visual Evaluation Reports that Shine

Instructor: Sheila Robinson, EdD, Owner and Principal of Custom Professional Learning LLC

Description: We create evaluation reports for our audiences. Both our Program Evaluation Standards and AEA Guiding Principles for Evaluators compel us to report evaluation findings in ways that are honest, accurate, and actionable. Well-designed reports that meet these standards of quality and ethics are more likely to be both read and used.

This is a technical course on report design to promote evaluation use. We will go beyond Word and Excel defaults to leverage the ease and flexibility of PowerPoint*, applying basic principles of graphic design, visual communication, and data visualization. The goal is to create visually appealing and compelling information products—reports, executive summaries, one-pagers, infographics—that invite readers in, encourage them to think more deeply about evaluation results, and ultimately inspire action.

*Principles will apply to Keynote or Google Slides as well, but all content, techniques, and exercises will be presented in PowerPoint.

The course is delivered in two virtual instructor-led modules. Read more about each of the modules below.

MODULE 1: Laying the Foundation with Design Principles

In this module, participants will explore key reasons to develop more visual communication and lay the foundation for an effective visual report. Participants will learn fundamental principles of graphic design, how we can apply them in our work, and how to align reports with organizational branding and style guides. Participants will learn the PowerPoint tools and techniques necessary to set up a custom report – adjusting slide size, determining font and color themes, creating custom layouts, etc.

MODULE 2: Communicating with data and images

In this module, participants will explore communicating with data and images, exploring best practices in data visualization and infographics. The class will look at sourcing high quality photography and how to manipulate images with artistic effects in PowerPoint to align with report style and organizational brand.

Gender-Transformative Program Design and Evaluation

Instructor: Tessie Catsambas, MPP, Co-founder of EnCompass LLC, CEO/CFO, and Elizabeth Stones, MPH, Senior Gender and Inclusive Development Specialist, EnCompass LLC

Description: Using a gender-transformative lens, this practical course follows comprehensive approach to integrating gender into project design and evaluation. Participants will conduct a deep dive into conducting gender-transformative program design and evaluation in a range of issues including agriculture, education, political participation, combatting gender-based violence, and address intersectionality in gender issues. At the end of this course, participants will be able to articulate the case for gender integration, conduct gender analysis, and integrate gender into development programs and evaluations in ways that promote healthy gender norms, structures and behaviors.

This course is delivered in four virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: The Gender-Transformative Lens and Gender Analysis

The gender-transformative lens goes beyond a gender-responsive frame; it not only looks to adapt programs

into existing gender norms, but is driven by a vision of healthy, equitable, inclusive and productive gender relationships and structures. In this module, participants will review a number of approaches to gender analysis, and learn how to recognize a high-quality gender analysis, and how to use it in program design and evaluation. Participants will practice with a range of questions to conduct gender analysis, and also engage in a self-assessment of their own positionality in the gender map continuum. By the end of this module, participants will be able to use a gender analysis framework, and take a systems thinking approach to gender analysis in a range of programs.

MODULE 2: Integrating Gender into Project Design

Using the Gender Integration Continuum, this module will explore the integration of gender into developing program theories of change. Participants will practice using findings from gender analysis to “engender” a theory of change. By the end of this module, participants will be able to advocate convincingly about the imperative of contributions of gender integration into program design and TOR, and provide examples of what would be lost without it.

MODULE 3: Integrating Gender in Evaluation

Building on a theory of change, participants will develop a monitoring system that incorporates a gender transformative lens, and explore its use in program management. Participants will then practice developing engendered evaluation questions and indicators. With practical exercises and case studies, participants will learn to organize their evaluations to embed a gender transformative lens into data collection. Case studies will include issues of women’s political participation, challenging systemic gender-based discrimination, and promote healthy male gender norms.

MODULE 4: Integrating Gender into Data Analysis and Report Writing

In this module, participants will learn good practices in data analysis that help them build gender in findings and recommendations. How should evaluators present issues that challenge fundamental aspects of program design? How should evaluators (and program managers) address issues of systemic discrimination that is much larger than one particular program? This module will suggest practical ways to navigate these and other such difficult

findings in ways that enable programs to learn and improve productively within systems of embedded inequalities. A simulation test will review lessons from the whole course.



Harnessing Frontier Digital Technologies for Evaluation

Instructor: Valentine J. Gandhi, PhD, Implementation Scientist, Development Economist, Policy Advisor, Poverty and Livelihood Impact Evaluation Specialist, ICT4D and Knowledge Manager

Description: Around the world, donors and implementers are trying to figure out how best to use emerging technologies like artificial intelligence (AI), blockchain, big data, and the internet of things (IoT) to support development efforts. While we have a responsibility to ensure these technologies are harnessed to their full potential, we must also be aware of the limitations of their use. For example, blockchain has been proposed as a validity solution for almost anything. However, blockchain is not a failsafe way to create data integrity.

This course is designed for those who are working on digital tools for development, and those who are tasked with implementing projects that include big data, AI, blockchain, machine learning, drones, and other technology solutions for development. The course will focus less on the technologies themselves than on evaluation tools, methods, and frameworks that can help participants design decision support tools for program

practice. This course will help evaluators and development practitioners use evaluation methods such as complexity-aware monitoring, sense making, developmental evaluation, data quality frameworks, and ethics beyond bias approaches to implementing frontier technologies in the field.

This course is ideal for evaluators, program managers, and technology experts working in the field of technology for good or those who want to build their capacity and knowledge in this area. Some background in evaluation is useful and desirable.

This course is delivered in three virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: An overview of frontier technology

The course will begin with an overview of frontier technologies associated with the fourth revolution such as blockchain, AI, drones, big data, and the IoT, among others. Participants will gain insight into these technologies and participate in a short quiz as well as a Q&A session with the course instructor.

MODULE 2: Choosing the right technology for your evaluation

In module 2, participants will focus on existing evaluation methods and how they can be used to develop decision support tools to choose the right technologies from a problem-solving perspective, considering social and structural barriers in a community. The evaluation methods discussed in this module will be developmental evaluation, outcome mapping, and Blue Planet evaluation. The participants will complete a short quiz after the module and attend a Q&A session with the course instructor.

MODULE 3: Developing a Frontier Technology Road Map for your project

In the final module, participants will develop a road map for harnessing frontier technologies in development projects. The participants will take real-world examples from their own projects that call for application of frontier technologies and apply the lessons learned from previous modules to develop an evaluation and learning road map that helps them implement these technologies. The participants will work on a short assignment that presents a problem that requires application of frontier technologies and use these methods to develop agile learning tools to support project implementation.

Mixed Methods Research and Evaluation

Instructor: **Cherie M. Avent**, PhD, Assistant Professor at the University of Illinois at Urbana-Champaign

Description: This course introduces evaluators and researchers to mixed methods inquiry. Incorporating mixed method approaches can allow for better understanding and solving of complex problems. Further, mixed methods engage diverse viewpoints. We will explore the nature and purpose of mixed methods, techniques for designing and conducting a mixed method study, and strategies for reporting findings.

This course is delivered in three virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: History and Purposes of Mixed Methods

Module 1 builds a foundation for understanding mixed methods. Participants will learn the roots of mixed methods, rationales for conducting mixed methods, and its advantages and difficulties. The objectives of module 1 include:

- Define mixed methods
- Understand the history of why mixed methods emerged
- Describe the nature and purposes for mixing methods
- Explain benefits and challenges to mixing methods

MODULE 2: Designing a Mixed Methods Study

Once we understand the purpose(s) for mixing methods, designing a mixed methods study follows. Module 2 focuses on creating a mixed method study from writing research questions to selecting and implementing a design type. We will explore different mixed methods designs, including but not limited to sequential, convergent, and nested designs. In small groups, participants will have the opportunity to practice writing research questions and constructing a mixed methods study. The objectives of module 2 include:

- Develop mixed methods research questions
- Learn components of core mixed method designs
- Create a mixed method study
- Evaluate mixed methods research

MODULE 3: Integrating Data in Mixed Methods Research and Disseminating Findings

A key element of mixed methods research and evaluation is integrating qualitative and quantitative data. More specifically, how do the qualitative and quantitative data interact with one another? Module 3 centers on steps for conducting and reporting the findings of data integration. Additionally, we will discuss strategies for disseminating mixed methods results in ways that present a compelling story based on the data while also respecting qualitative and quantitative traditions. The objectives of module 3 include:

- Define integration
- Understand practices for integrating qualitative and quantitative data
- Explore approaches for sharing results of a mixed methods study



Organizational Capacity Assessment

Instructor: Scott Chaplowe, MA, Evaluation, Strategy, and Capacity Development Specialist

Description: Organizations deliver the interventions (e.g., programs, strategy, policy) that we evaluate. Therefore, the ability to assess, understand, and advise organizational capacity development in relation to these interventions is an important skill set in the evaluator's toolbox. This workshop will bridge theoretical concepts with practical, hands-on guidance for organizational capacity assessment (OCA), stressing a heuristic, systemic

approach that can be adapted to different organizational contexts. It is appropriate for evaluation specialists or those who commission, manage, or use OCA. By the end of the course, learners will understand OCA, when it is useful, its key principles, different OCA frameworks, and practical considerations during the inception, implementation, and follow-up phases of OCA. Hands-on tools and resources will be introduced that can be adapted to a variety of organizational contexts to approach and support OCA.

This course is delivered in three virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: An Overview of OCA and the Scoping Process

Module 1 will provide an overview of OCA, why it relevant, when and how it can be used, and key elements of successful implementation. Participants will explore the foundational concepts needed for the subsequent modules and will complete the session with a clear understanding of when and where an OCA may be appropriate, and the key considerations required to support its success. A systematic four-step approach will be framed for planning and executing an OCA: 1) Scope the OCA; 2) Design the OCA; 3) Conduct the OCA; 4) Report and follow-up. The module will end with examining key scoping questions, summarized on a practical handout.

MODULE 2: Moving from Scoping to Designing the OCA

Module 2 continues to examine step 1, scoping the OCA, including stakeholder mapping/analysis and determining who will lead the OCA process. It then focuses on step 2, designing the OCA, including the major existing frameworks used, their pros and cons, and the organizational contexts most suitable for different approaches. Each organization will be distinct in time and place, and OCA should be tailored according to the unique configuration of different factors and actors that shape the supply and demand for OCA. By the end of this module, participants will be able to think through the application of a variety of approaches, rather than diving deeply into just one.

MODULE 3: Conducting the OCA, Reporting and Following-Up

Module 3 will examine step 3, conducting the OCA, including specific tools and tips for conducting the OCA;

facilitating meaningful data collection; the sense making of casual analysis; and troubleshooting potential challenges during the OCA. It will then look at the different ways the OCA learning can support step 4, which is reporting to support follow-up.

Participatory Data Analysis, Integration, and Synthesis (DAIS)

Instructor: Lynne M. Franco, ScD, Special Advisor at EnCompass LLC

Description: To promote evaluation use, evaluators must effectively analyze, integrate, interpret, and synthesize data into information that can be shared. We do our best to emerge with the most truthful narrative our data can tell. This effort is particularly challenging in mixed methods evaluations, where teams work with data from various sources that may have been analyzed at different times and by different people.

This course provides participants with the DAIS approach, a highly participatory, rigorous approach to integrating data, which evaluation teams can use to get from data collection and analysis to a coherent narrative arc and a roadmap for completing the evaluation product. Using this approach, the evaluation team can feel confident that their findings, conclusions, and recommendations represent the story the data are telling.

By the end of this course, participants will be able to prepare and conduct a DAIS, including producing analysis summaries, drafting findings, moving from integrated findings to conclusions and recommendations grounded in the data, and adapting the DAIS approach to varying teams and types of evaluation.

This program, delivered in two virtual, instructor-led modules, focuses on a real-life case study and practical application. Read about each of the modules below.

MODULE 1: Overview, Steps, and Getting to Findings

This module introduces the DAIS approach and the case study, and then takes participants through the process of determining what team members will share from their analysis with others and how (from various data sources or other grouping), and how to integrate the data to develop strong, evidence-based, balanced statements of findings. Throughout the session, we will explore how this approach can be applied in the context of

evaluations that participants have conducted or are conducting.

MODULE 2: Getting to Conclusions, Recommendations, and a Strong Evaluation Product

This final module will cover moving to conclusions and recommendations, and getting to a narrative arc for the evaluation product. This module will continue the case study, and end with a discussion of how this approach can be adapted to a range of evaluation types and contexts.

Participatory Evaluation: Conceptual and Methodological Considerations (Evaluación Participativa: Consideraciones Conceptuales y Metodológicas)

Instructor: Pablo Rodriguez-Bilella, PhD, Director of the Program for the Study of Labour, Environment and the Society (PETAS) at the University of San Juan, Argentina

Description: The course initially aims to conceptualize participatory evaluation, presenting its different aspects and concentrating on the basic principles that underlie an evaluation of this type. From this, the participatory evaluation process will be introduced, identifying and characterizing its basic method, understanding it as capable of being adapted to different contexts and situations. A special place will be provided to present and discuss the role of the facilitator of a participatory evaluation experience, responsible for guaranteeing the protagonism of multiple actors throughout the process. Finally, the role of participatory tools and techniques will be analyzed in the context of this type of evaluation, reflecting on their scope and limitations, as well as the possibilities of adaptation to different contexts and groups, presenting a series of useful criteria when it comes to choose and use participatory methodologies. The course will try to be as participatory as possible, trying to become a true learning experience for those who take part (and become part) of it.

This course is delivered in one virtual, instructor-led module.

El curso apunta inicialmente a conceptualizar a la evaluación participativa, presentando sus diferentes vertientes y concentrándose en los principios básicos que subyacen a una evaluación de este tipo. A partir de ello, se introducirá el proceso de la evaluación participativa,

identificando y caracterizando su método básico, entendiéndolo como susceptible de ser adaptado a diferentes contextos y situaciones. Un lugar especial se le brindará a presentar y discutir el rol de la persona facilitadora de una experiencia de evaluación participativa, responsable de garantizar el protagonismo de múltiples actores durante todo el proceso. Finalmente, se analizará el papel de las herramientas y técnicas participativas en el contexto de este tipo de evaluación, reflexionando sobre sus alcances y limitaciones, así como las posibilidades de adaptación a diferentes contextos y grupos, presentando una serie de criterios útiles a la hora de elegir y usar metodologías participativas. El curso procurará ser lo más participativo posible, procurando convertirse en una verdadera experiencia de aprendizaje para quienes tomen parte (y se hagan parte) de él.

Este curso se imparte en un unico modulo virtual con instructor en vivo.

Positive Psychology: A Powerful Tool in Your Professional Evaluation Toolkit

Instructor: [Stewart I. Donaldson](#), PhD, Executive Director of the Claremont Evaluation Center (CEC) at Claremont Graduate University, and Professor of Psychology and Community and Global Health

Description: Positive psychology is the scientific study of the strengths that enable individuals, programs, organizations, and communities to thrive. Two decades of scientific research suggest important concepts and applications that can be used to improve evaluators' practice, careers, and personal lives. In this two-module course, participants will learn about the nine key building blocks of well-being and positive functioning, and how to apply them as a powerful tool in your professional toolkit. Whether you are an evaluator, a senior manager, or a training designer, learning the principles and practices of positive psychology will not only help you to find more meaning in your own work, but it will also help you to bring out the best in others.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: The Science of Positive Psychology

The science behind positive psychology shows that there are key practices that help individuals lead happier and more productive lives. In this module, participants will come to appreciate the science and application of positive psychology principles. Through a series of interactive exercises, participants will reflect on their own lives and professional practice to see firsthand how fulfilling a focus on well-being and positive functioning can be. Participants will explore the implications of positive psychology for their careers and professional practice.

MODULE 2: The Building Blocks in Action

Participants will learn about three of the nine building blocks in depth (flow and engagement in life and work; positive emotions and relationships; and positive mindset and resilience), and how to enhance each of these building blocks to achieved higher levels of well-being and positive functioning for themselves, as well as for their clients, stakeholders, co-workers, family, and friends.

Practical Applications of Artificial Intelligence (AI) in Evaluation Practice

Instructors: [Zach Tilton](#), MA, Evaluation Specialist with The MERL Tech Initiative and [Linda Raftree](#), CIPP & CIPM, Founder of The MERL Tech Initiative

Description: Are you eager to begin using artificial intelligence (AI) tools to enhance your evaluation practice, but unsure about what tools to use and when? This course offers a hands-on approach to harnessing the power of AI for optimizing evaluation practices. Participants will gain practical experience with AI tools and techniques, learning to implement and integrate them into real-world evaluation scenarios. The session will cover the types of tools and technologies available in the market, ways to assess these tools, and considerations related to ethics and privacy. Demos, case studies and small group work, will prepare participants to begin using AI tools to support evaluation design, data capture/analysis, and reporting. The course showcases a range of tools and focuses on the possibilities and considerations evaluators must think through when deciding whether and how to use them. By the end of the course, participants will be equipped to leverage AI

technologies to deliver more accurate and impactful evaluation outcomes.

This course is delivered in one virtual, instructor-led module.

Principles-Focused Evaluation

Instructor: Michael Quinn Patton, PhD, Founder and Director, Utilization-Focused Evaluation

Description: Principles-focused evaluation makes a program's principles the focus of evaluation. Three questions are the focus of evaluation: (1) To what extent and in what ways are the program's principles meaningful to those they are meant to guide? (2) If meaningful, to what extent and in what ways are the principles adhered to? (3) If adhered to, to what extent and in what ways do principles guide results? The course will present and explain the GUIDE approach to developing and evaluating principles. GUIDE calls for principles to be directive, useful, inspiring, adaptable to contexts, and evaluable. We will share examples of principles-focused evaluations.

This course is delivered in four virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: The Niche and Contributions of Principles-Focused Evaluation

Participants will learn (1) the niche, nature, and purpose of principles-focused evaluation; (2) the criteria for conducting a principles-focused evaluation; and (3) the GUIDE framework for principles-focused evaluation. Principles-focused evaluation will be placed in the larger context of evaluation models, approaches, and theories. A core issue in evaluation is matching the approach to the situation and context. This module will elucidate what principles-focused evaluation is, and when, where, how, and why it is appropriate to use.

Participants will learn the GUIDE criteria for crafting and evaluating. We will illustrate the application of the GUIDE framework with a range of examples from the United States and other countries, from small programs to global change initiatives, and from completed evaluations to emergent, leading-edge initiatives just being designed. Participants will have the opportunity to interact with the instructor and share their own examples

MODULE 2: Diverse Applications of Principles-Focused Evaluation with an Emphasis on Culturally Responsive Applications

Principles-focused evaluation involves both crafting principles and evaluating them. The crafting process depends on whether a group has been operating for some time or is new, and what kinds of principles are being generated for what purposes. Principles are especially meaningful and useful with government and foundation initiatives, especially those intended to reach and serve diverse and underserved people, because they stimulate conversations about values and assumptions early on and embed them in evaluation. They also resonate with indigenous and other initiatives that embrace a culturally responsive approach. Participants will practice generating and revising principles, and examining principles in their fields of interest and knowledge.

MODULE 3: Principles for Evaluation

So, what does it look like when we embed principles into evaluation? This module will focus on general guiding principles for evaluation and their application. We will distinguish ethical principles from effectiveness principles. We will examine principles for: Utilization-Focused Evaluation, Appreciative Inquiry, Developmental Evaluation, Collaborative Evaluation, Empowerment Evaluation, Systems Evaluation, Blue Marble Evaluation, and Complexity Evaluation, as examples. We will illustrate a framework for integrating diverse evaluation approaches based on the principles of the Global Alliance for the Future of Food. Participants will practice applying specific principles to their own evaluations.

MODULE 4: Evaluating Principles

This advanced module will focus on evaluating principles, and feature both inductive and deductive approaches. We will adapt overarching evaluation questions to specific contexts: (1) To what extent and in what ways are the program's principles meaningful to those they are meant to guide? (2) If meaningful, to what extent and in what ways are the principles adhered to? (3) If adhered to, to what extent and in what ways do principles guide results? We will develop and review rubrics for evaluating principles, and present and discuss examples of actual evaluations.

Recommended Text

Principles-Focused Evaluation: The GUIDE

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Qualitative Research Methods for Evaluation

Instructor: Ayesha S. Boyce, PhD, Associate Professor in the Division of Educational Leadership and Innovation at Arizona State University

Description: This three-module course will survey the range of qualitative research methods and methodologies that can be applied to program evaluations. The course will begin with an overview of the foundations of qualitative inquiry and their purposes in evaluation. Then, participations will work through the practical aspects of developing evaluation questions, framing instruments, data analysis, and reporting. Topics to include qualitative methods of observation, interview,

document analysis, and qualitative methodologies of case study, action research, and ethnography.

This course is delivered in three virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Foundations

Participants will learn about research versus evaluation, how research methods and methodologies fit into evaluation, and the relationships between axiology, ontology, epistemology, and methodology. This module will also overview the difference between method and methodology and will overview the goals and purposes of qualitative methods and types of questions that can be answered with qualitative data.

MODULE 2: Applying Qualitative Methods in Practice

Participants will work through the practical aspects of developing evaluation questions, framing instruments, analyzing data, and reporting with qualitative methods including observation, interview, document analysis, and qualitative survey data.

MODULE 3: Applying Qualitative Methodologies in Practice

Participants will work through the practical aspects of developing evaluation questions, framing instruments, analyzing data, and reporting with qualitative methodologies including case study, action research, and ethnography.

Quantitative Research and Evaluation Methods

Instructor: Tarek Azzam, PhD, Associate Professor at University of California, Santa Barbara

Description: Are you an evaluator, researcher, or social scientist who is looking to learn more about the basics of quantitative methods? These methods are commonly used when quantitative data and information can be incorporated to answer various questions about a program's impact and fidelity of implementation. In this introductory course, we will explore various quantitative methods including quasi-experimental and experimental designs, introduce some of the analytic techniques used in these designs, highlight issues related to the use of measurement (such as surveys) and databases, and present multiple examples of how this knowledge can be used in the real-world.

This course is delivered in four interactive modules. This course is targeted to individuals who are relatively new to quantitative methods in research and evaluation.

Read more about each of the modules below.

MODULE 1: Experimental & Quasi-Experimental Designs Part I

Module 1 builds a foundation for understanding various quantitative research designs, including random and non-random designs, and the conditions where they can be optimally used. We will also go through various validity issues related to each design option and discuss ethical considerations to keep in mind when using these approaches.

MODULE 2: Experimental & Quasi-Experimental Designs Part II

Module 2 builds on the first session, providing examples of how various experimental and quasi-experimental designs can be used in evaluation, with a focus on the practical aspects of implementing these designs in the real world. By studying these examples, participants will have the opportunity to learn about the benefits and challenges associated with various designs.

MODULE 3: Measurement & Databases

Module 3 will focus on the various types of data and measures that can be used in quantitative designs. The module will cover issues related to sampling, measurement design, operationalizing constructs, and using existing measures to answer various evaluation questions.

MODULE 4: Introduction to Analytic Techniques

The final module will introduce participants to some of the commonly used statistical concepts used in the analysis of quantitative data, including descriptive statistics and inferential statistics (such as regression, and t-test, and Analysis of Variance (ANOVA)). The module will offer a perspective on how to approach the analysis process and link it to the various quasi-experimental and experimental designs. This introduction will be taught on the conceptual level, under the assumption that participants have little to no background knowledge in statistics. The instructor will share resources on analytic techniques, analysis software (free and paid), and where to access more advanced topics for those who wish to pursue additional self-study.

Real-Time Evaluation (RTE): Using Timely Evidence and Learning to Drive Improvement

Instructor: Scott Chaplowe, MA, Evaluation, Strategy, and Capacity Development Specialist

Description: Two key factors have shaped evaluation in the 21st century. First is the complexity and urgency of the challenges interventions seek to address. Second is the increasing frequency and magnitude of disruption (from climate change and pandemics to political change, economic recession, and war) that challenges the interventions designed to address these complex problems as well as their evaluation. These interrelated trends have pushed evaluation beyond the boundaries of conventional evaluation methodologies to alternative paradigms and approaches that embrace the volatility, complexity, and uncertainty that increasingly characterize the evaluand where interventions are delivered and evaluated.

This workshop will provide an overview of real-time evaluation (RTE) to support real-time learning (RTL) for timely and useful evaluation that informs operational decision making and course correction to ensure interventions remain relevant, realistic, and impactful. The workshop is appropriate for those considering RTE as an evaluation commissioner, evaluation manager, or evaluator. A prior understanding of these concepts and practices is not a prerequisite to participate in the course.

By the end of the course, participants will understand:

- What RTE and RTL are, how they differ, and overlap
- RTE's humanitarian roots and the drivers for its uptake in non-humanitarian sectors and program areas
- Benefits and limitations of RTEs
- When RTE is or is not appropriate
- Key considerations for commissioning, planning, managing, and conducting RTEs
- Who to include in the composition of a RTE team
- Data collection methods for RTE and RTL
- Reporting and communication methods for RTE and RTL

This course is delivered in one virtual, instructor-led module.

Report Redesign

Instructor: Ann K. Emery, MS, Data Visualization Speaker & Designer, Depict Data Studio

Description: When you hear the term “dusty shelf report,” what comes to mind? Even if you haven’t heard that term, you’ve seen one: Times New Roman, size 12, double-spaced, one-inch margins. Too much narrative and too few visuals. Or, monotonous visuals: mostly bar charts or maps.

Formatting is important, but what matters most is the impact. When was the last time your report actually influenced real-world decisions? Our reports have the potential to drive policy decisions, budgeting decisions, and programmatic decisions—when they are designed well, accessible, and delivered to the right people at the right time.

In this one-module training, you’ll learn techniques for transforming dusty shelf reports into reports that actually inform decisions using software you already have, like Word, PowerPoint, and Excel.

This course is delivered in one virtual, instructor-led module.

Survey Design

Instructor: Bianca Montrosse-Moorhead, PhD, Associate Professor of Research Methods, Measurement, and Evaluation at the University of Connecticut

Description: Surveys are everywhere, especially in the social, behavioral, and evaluation sciences. They are really easy to use. They are also really easy to mess up, making results useless. In this course, participants will learn the importance of good survey design, including when to use them, how to design them, and avoiding common mistakes.

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Survey Foundations & Development

In this module, we will explore when to use surveys, survey types, how to develop a project management plan for a survey, how to write good questions and format them properly, and common survey errors during the survey development process and how to correct them.

MODULE 2: Survey Piloting, Analysis, & Reporting

In this module, participants will learn different pilot testing methods for surveys, best practices for encouraging responses, and common survey errors during the piloting process and how to correct them. We will also briefly touch upon survey analysis and reporting, with a focus on best practices.

Theory of Change (Théorie du Changement)

Instructor: Leona Ba, PhD, Senior Change Management Specialist, Prosci Certified Change Manager

Description: This practical course presents the theory of change as a tool for program design and evaluation that increases the likelihood that programs are relevant and effective. Through definitions of key concepts and exercises, participants will gain a common understanding of the theory of change. Next, they will apply this knowledge through a group activity in which they will work on the building blocks of a project’s theory of change. By the end of this module, participants will be able to use approaches and practices that optimize the ability of the theory of change to guide implementation and ensure that the project is relevant and achieves expected results.

This course is delivered in one virtual, instructor-led module.

Ce cours pratique présente la théorie du changement comme un outil de conception et d’évaluation de programme qui augmente la probabilité que les programmes soient pertinents et efficaces. Grâce à des définitions de concepts clés et des exercices, les participants acquerront une compréhension commune de la théorie du changement. Ensuite, ils appliqueront ces connaissances à travers une activité de groupe dans laquelle ils travailleront sur les éléments constitutifs de la théorie du changement d’un projet. À la fin de ce module, les participants seront en mesure d’utiliser les approches et les pratiques qui optimisent la capacité de la théorie du changement à guider la mise en œuvre et à s’assurer que le projet est pertinent et atteint les résultats escomptés.

Ce cours est offert à travers un module virtuel dirigé par un instructeur.

Transformative Evaluation: Using Mixed Methods to Address Inequity and Adversity

Instructor: Donna Mertens, PhD, Professor Emeritus at Gallaudet University

Description: Transformative evaluation provides a lens for evaluators who work in contexts of inequality and adversity with a goal of social transformation. It supplies an umbrella that encompasses evaluations designed to support the transformation of marginalized communities, such as people living in poverty, women, people with disabilities, racial and ethnic minorities, indigenous communities, homeless people, sexual minorities, and others. It seeks to answer the question: How should we design our evaluations if we are to contribute to a more socially, economically, and environmentally just society?

This course is delivered in two virtual, instructor-led modules. Read more about each of the modules below.

MODULE 1: Overview of Transformative Evaluation

The world is facing a number of wicked problems for which there are no agreed upon solutions—climate change, poverty, conflict and violence, and lack of access to healthcare, education, housing, and employment. These problems, and appropriate evaluation strategies to address them, are relevant in domestic and international contexts. For example, the worldwide community has recognized the need to set goals that explicitly address these problems in the form of Sustainable Development Goals. Evaluators are called upon to design evaluations that support the type of transformative change needed to meet these goals. The ethical assumptions that underlie an evaluator’s responsibilities operating to support transformative change will be examined in the first module, along with methodological implications that align with these assumptions. Building relationships, being culturally responsive, and forming coalitions to enhance ownership and utilization will be part of this module. Participants will have the opportunity to apply the concepts to a case study.

MODULE 2: Methodologies from a Transformative Lens

The transformative lens for evaluation is methodologically eclectic. It includes phases of forming relationships, conducting contextual analysis, and process and impact evaluations. Many approaches to evaluation can be used under this umbrella, such as

Appreciative Inquiry, community-based and participatory approaches, and randomized controlled trials. However, the methods are chosen to be consciously responsive to the culture and context of the evaluation, and to serve the transformative goals of the project. In this module, the use of mixed methods that apply a transformative lens and a variety of methodological approaches will be examined. Participants will have the opportunity to apply this approach to a case study.

Using Interviews to Enhance Evaluation Practice

Instructor: Bianca Montrosse-Moorhead, PhD, Associate Professor of Research Methods, Measurement, and Evaluation at the University of Connecticut

Description: This course will demonstrate approaches to using interviews to enhance evaluation practice, including the research that supports the best ways to create and conduct good interviews, practical steps to being successfully set up to use interviews throughout an evaluation, options for processing interview data, and visualizing interview data. Challenge questions we will explore throughout the four modules include:

- What are the different ways interviews can be used at any point in the evaluation process to enhance its quality, relevance, and usefulness?
- What does the research say about how best to prepare for and conduct good interviews, and how can you put this information to use?
- What interview challenges should you anticipate, at what part in the interview process, and how can you address them?

This course is delivered in four virtual, instructor-led modules. Read more about each of the modules below.



MODULE 1: Interview Foundations

Interviews are traditionally framed as a data collection method—something one does to collect data aligned with key questions. A more expansive view positions interviews as a tool that can be used throughout the life cycle of an evaluation: from helping to define the purpose of an evaluation to presentation of findings with an eye toward use, and anywhere in between. In this module, you will reflect on and share your interview experiences, become aware of the use and value of interviews at different parts in the evaluation process, and learn interview fundamentals. In Module 1, you will:

- Share successful interview experiences and identify themes on what makes excellent interviews.
- Learn and be able to articulate the value of interviews at different parts in the evaluation process.
- Describe interview foundations, including relevant research.

MODULE 2: Setting Yourself Up for Success—Interview Questions, Guides, and Requests

Evaluation experts and researchers have identified several planning elements and principles that can lead to a more successful interview experience. These include being able to create good interview questions aligned with your purpose, the best ways to structure interview guides, and the best approaches to interacting with individuals you would like to interview. Through a mix of

small group work and hands-on activities, in Module 2, you will:

- Create and evaluate different types of questions using interview principles.
- Construct, refine, and use good interview guides.
- Understand best practice with regards to interview requests and be able to put this knowledge to use.
- Become aware of and able to address common interview challenges that come up during the interview planning process.

MODULE 3: Interview Competencies and the Secrets to Conducting Good Interviews

Interviewers need to bring several competencies to the room, and these competencies can be learned and refined. Through a mix of video case studies, small group work, and hands-on activities, in Module 3, you will:

- Be aware of the competencies that interviewers need to bring to the room.
- Evaluate and practice putting these competencies to use.
- Become aware of different options for dealing with difficult interview situations, and practice addressing them.

MODULE 4: Recording, Processing, and Visualizing Interview Data

There is both a science and art to recording, processing, and visualizing interview data. There are also several practical aspects that need to be considered during this phase of the interview process. Through a mix of small group work and hands-on activities, in Module 4, you will:

- Become aware of different options for recording interview data, including pros and cons of each approach, so you can make informed decisions.
- Understand different options for processing interview data, what qualitative analysis software is out there, including low and no-cost options, to help you with analysis.
- Practice processing interview data.

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