



Summer Institute in Program Evaluation

Winnipeg, June 2011

Final Report



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INTRODUCTION AND BACKGROUND

Community health organizations and social agencies have identified the need to enhance their capacity in using evidence for program planning and implementation, as well as increase competence to evaluate their practices. This priority has led to the creation of a partnership among three agencies in Manitoba (Nine Circles Community Health Centre, Health in Common, and United Way of Winnipeg) and The University of Manitoba with the purpose of developing and implementing structured initiatives for knowledge exchange and capacity building in evidence-based practice and evaluation. Among its initiatives is an annual *Summer Institute in Program Evaluation* the second of which was held June 13 to 17, 2011 at the University of Manitoba in Winnipeg.

The overall goal of the *Summer Institute* was to create a common space where researchers and local practitioners in community-based organizations can complement their different knowledge and experience, increasing knowledge exchange and learning opportunities.

OBJECTIVES

The specific objectives of the *Summer Institute* were to:

1. Increase the capacity of community leaders, management, staff, and university students to utilize empirical evidence for program planning and implementation and to enhance their program evaluation capabilities; and
2. Establish a sustainable community-university network among practitioners and researchers for ongoing knowledge translation, knowledge exchange and utilization, and evidence-based practice.

The *Summer Institute* was open to students and community and enabled participants to exchange information about evaluation for improved health promotion planning and delivery.

The program targeted:

- Project managers and coordinators responsible for the monitoring and evaluation of their programs, projects or organizations;
- Community leaders and workers with project responsibilities;
- Decision makers looking at new ways to make their programs more participatory and responsive to local needs;
- Undergraduate and graduate students seeking to improve their skills and knowledge in the area of community-based program evaluation; and
- All those seeking to connect with students, practitioners and researchers involved in delivery and evaluation of a broad range of health and social services.

THE COLLABORATORS

The Institute collaborators included representatives from:

- *Health in Common*: Health in Common is a not-for-profit organization that works to strengthen inter-sectoral partnerships to address the social, environmental and economic factors that build healthy sustainable communities.





- *Nine Circles Community Health Centre-Prairie HIV Community-Based Research Program*: Nine Circles is a community based, non-profit centre specializing in HIV/STI prevention and care, located in Winnipeg, and HIV-CBR is a CIHR funded capacity-building program to support organizations undertake HIV/AIDS community-based research and facilitate collaboration between community and researchers;
- *The University of Manitoba*: The Faculty of Human Ecology, the Faculty of Social Work, Faculty of Arts; Faculty of Environment, Earth and Resources; and Extended Education were part of this initiative.

At least one member from each organization took part on the organizing committee of the *Summer Institute*. Further, all partners provided at least one instructor for the Institute.

THE CURRICULUM

A combination of lecture, case study and group work was used to introduce the participants to the concepts of participatory evaluation focusing on the social, economic and environmental determinants of health and well-being. Through interactive sessions, researchers and program specialists reviewed the theoretical and practical aspects of using both empirical research evidence and program evaluation as tools for knowledge development and exchange. The Summer Institute participants learned about systematic reviews of research, how to develop program evaluation plans, and how to utilize findings from research and evaluation to improve planning and practice. Participants were provided with the opportunity to explore real-life case studies in using program evaluation for knowledge exchange and program planning. Community participants and university students partnered in the development of frameworks for the evaluation of their health promotion programs.

The specific structure of the week-long program involved a series of lectures and presentations followed by interactive hands-on workshops directed towards the application of concepts. Community participants were asked to bring with them information on current and potential programs they are working on to utilize this common space in the development of evaluation frameworks and plans with guidance from the academics. Students developed their skills through working on these programs with community participants. Each *Summer Institute* participant received extensive documentation and resources regarding the topic areas that were covered. A website was created where lectures, evaluation frameworks and resources are posted, and the website continues to be maintained and used as part of the knowledge exchange and knowledge translation network (www.thesummerinstitute.ca).

In addition to workshops and seminars, participants were offered keynote presentations offered by distinguished lecturers from around Canada and around the world including Dr. Margaret Kovach (Indigenous Methodologies in Evaluation); Roger Miranda (Things Evaluators Don't Want to Hear); Dr. Lawrence Deane (Participatory Evaluation Methods); Dr. Javier Mignone (Systematic Review as Program Theory); Dr. Heather Buchanan and Dr. Wayne MacDonald (Ethical Challenges in Evaluation).





THE CASE STUDIES

Prior to the Institute, community collaborators engaged with a number of community organizations to identify a number of possibilities for case studies to become the springboard for applying the concepts imparted in the Institute into actual situations. The community organizations sought this as an opportunity to obtain assistance in the development of evaluation plans for some of their programs. These agencies also committed to supporting a member of their organization to attend the Institute and act as a key informant during the small group work around their cases.

Seven case studies were developed from the following agencies' programs:

1. Interlake Regional Health Authority – Community Wellness Program
2. Active and Safe Routes to School – School Travel Planning
3. Food Matters Manitoba – Our Food, Our Health, Our Culture
4. West Broadway Development Corporation – Good Food Club
5. Nine Circles Community Health Centre – STI Drop-In Clinic
6. Food Matters Manitoba – Re-visioning the Manitoba Harvest
7. Manitoba Agriculture Food and Rural Initiatives – Animal Wellness Program

Diverse groups of participants worked together on each case. Over the week they develop an evaluation plan, which they presented at the end of the week. The Case Studies are appended to this report. The presentations resulting from the small group work are available at <http://www.thesummerinstitute.ca/2011/07/2011/>

THE PARTICIPANTS

Forty-nine participants attended the Institute. All participants registered were either from a community non-profit agency or a student at the University of Manitoba.

Community participants	19
Undergraduate students	17
Graduate students	13

EVALUATION

This evaluation report is based on feedback obtained from written evaluation forms completed by participants in the middle and at the end of the Institute, and from a pre-post evaluation knowledge survey.

Participants were asked to complete two written evaluations; one on the third day of the Institute and another on the final day. Response rate for both sets of evaluations was the 78% (38/49).



FINDINGS

Participants were asked to rate each lecture and workshop on clarity, relevance, and level of new knowledge gained (on a scale where 1 = poor and 4 = excellent) and on overall satisfaction. In relation to **Clarity of presentation** (Table 1) all lectures were consistently rated above 3.0 on the 4 point scales. Lowest scores (slightly below 3) were only recorded for *Indigenous Methods* session in terms of clarity (Mean = 2.81), relevance (Mean = 2.94) and overall satisfaction (Mean = 2.80).

In relation to **Relevance**, (Table 2), the sessions with the highest score were *Introduction to Quantitative Methods* (Mean = 3.86), *Evaluating the Evaluator* (Mean = 3.82) and *Introduction to Evaluation* (Mean = 3.82). When asked which session provided the greatest amount of **New Information** on the topic (Table 3), participants rated the *Case Study Work* the highest (Mean = 3.66). *Participatory Evaluation* and *Evaluating the Evaluator* were also considered to be highly informative sessions. Notably, all sessions were rated highly on this measure (3.00 or higher) indicating a high level of new knowledge gained throughout the week. When average scores for clarity, relevance, **Overall Satisfaction** (Table 4) and increased knowledge are combined, average scores range from 2.97 (*Indigenous Methods*) to 3.73 (*Introduction to Evaluation*).

Table 1: Clarity of presentation

	N	Min	Max	Mean	SD
Introduction to quantitative methods	14	3	4	3.93	.267
Introduction to evaluation	38	3	4	3.82	.393
Things evaluators don't like to hear	37	3	4	3.81	.397
Systematic review as program theory	37	3	4	3.73	.450
Advanced quantitative methods	7	3	4	3.71	.488
Participatory evaluation	37	3	4	3.65	.484
Reporting and use of findings	32	2	4	3.63	.554
Evaluation design	34	2	4	3.50	.615
Indicator development	34	2	4	3.50	.663
Qualitative methods	22	2	4	3.36	.658
Ethics in evaluation	37	2	4	3.19	.701
Evaluating the evaluator	11	2	4	3.18	.751
Case study work (Mid-week and final combined)	70	1	4	3.11	.860
Indigenous methods	36	1	4	2.81	.889



Table 2: Relevance of material presented

	N	Min	Max	Mean	SD
Introduction to quantitative methods	14	3	4	3.86	.363
Evaluating the evaluator	11	3	4	3.82	.405
Introduction to evaluation	38	2	4	3.82	.457
Participatory evaluation	36	3	4	3.69	.467
Reporting and use of findings	31	1	4	3.65	.661
Qualitative methods	22	2	4	3.64	.581
Case study work (Mid-week and final combined)	70	1	4	3.63	.726
Things evaluators don't like to hear	37	3	4	3.62	.492
Evaluation design	34	2	4	3.62	.604
Indicator development	34	2	4	3.59	.557
Advanced quantitative methods	7	2	4	3.57	.787
Systematic review as program theory	37	2	4	3.49	.651
Ethics in evaluation	37	2	4	3.38	.681
Indigenous methods	35	1	4	2.94	.906

Table 3: Did the presentation provide you with new information on the topic?

	N	Min	Max	Mean	SD
Case study work (Mid-week and final combined)	70	2	4	3.66	.587
Participatory evaluation	36	3	4	3.64	.487
Evaluating the evaluator	11	2	4	3.64	.674
Systematic review as program theory	37	2	4	3.57	.647
Introduction to evaluation	38	2	4	3.55	.645
Things evaluators don't like to hear	37	3	4	3.49	.507
Advanced quantitative methods	7	2	4	3.43	.787
Introduction to quantitative methods	14	2	4	3.43	.756
Evaluation design	34	1	4	3.35	.849
Indicator development	34	1	4	3.29	.836
Indigenous methods	37	1	4	3.16	.834
Reporting and use of findings	31	1	4	3.10	.790
Ethics in evaluation	37	1	4	3.05	.815
Qualitative methods	22	1	4	3.00	.873



Table 4: Overall satisfaction with session

	N	Min	Max	Mean	SD
Introduction to evaluation	36	3	4	3.75	.439
Participatory evaluation	36	3	4	3.69	.467
Case study work (Mid-week and final combined)	70	2	4	3.63	.594
Introduction to quantitative methods	14	2	4	3.57	.756
Systematic review as program theory	37	2	4	3.57	.555
Things evaluators don't like to hear	36	3	4	3.56	.504
Evaluation design	33	2	4	3.48	.619
Reporting and use of findings	31	1	4	3.48	.677
Evaluating the evaluator	11	2	4	3.45	.688
Advanced quantitative methods	7	2	4	3.43	.787
Indicator development	33	1	4	3.39	.788
Qualitative methods	20	2	4	3.30	.657
Ethics in evaluation	37	2	4	3.05	.524
Indigenous methods	35	1	4	2.80	.964

Table 5: Combined average

	N	Min	Max	Mean	SD
Introduction to evaluation	36	2.5	4.0	3.73	.389
Introduction to quantitative methods	14	2.8	4.0	3.70	.418
Participatory evaluation	36	3.0	4.0	3.67	.401
Things evaluators don't like to hear	36	3.0	4.0	3.61	.361
Systematic review as program theory	37	2.8	4.0	3.59	.434
Advanced quantitative methods	7	2.3	4.0	3.54	.668
Evaluating the evaluator	11	2.5	4.0	3.52	.467
Case study work (Mid-week and final combined)	70	1.8	4.0	3.51	.566
Evaluation design	33	2.3	4.0	3.50	.559
Reporting and use of findings	31	1.3	4.0	3.47	.580
Indicator development	33	2.3	4.0	3.46	.583
Qualitative methods	20	2.0	4.0	3.34	.575
Ethics in evaluation	37	2.0	4.0	3.17	.537
Indigenous methods	32	1.3	4.0	2.97	.764



ASSESSMENT OF KNOWLEDGE GAINED

In order to assess the degree of knowledge gained through the course, participants were asked to complete a pre and post evaluation survey asking them to rate their level of knowledge on aspects of evaluation related to: program evaluation principles; program evaluation methods; evaluation frameworks; process vs. outcome evaluation; culturally competent evaluation; quantitative methods; quantitative analysis; qualitative methods; qualitative analysis; reporting results; finding evaluation resources.

Surveys were submitted anonymously using online survey software (www.Fluidsurveys.com). 38 participants completed the pre-test for a response rate of 77.6%. 22 participants completed the post-survey for a response rate of 44.9%.

Results were entered into SPSS for analysis. Pre and post test scores were compared using Independent Samples t-tests¹. Pre and post-test mean scores are presented in table 6 below.

Table 6: Pre and Post Evaluation Skills Test Mean Scores

	Pre Test Mean (N = 38)	Post Test Mean (N = 22)	Difference	T-test
Finding evaluation resources	1.74	3.05	1.31	6.01***
Program evaluation principles	1.97	3.27	1.30	7.34***
Process vs. outcome evaluation	1.79	3.09	1.30	6.33***
Evaluation frameworks	1.76	3.00	1.24	6.34***
Program evaluation methods	2.00	3.09	1.09	5.88***
Culturally competent evaluation	1.55	2.50	0.95	4.85***
Qualitative analysis	2.24	3.00	0.76	3.48**
Reporting results	2.11	2.82	0.71	3.34**
Qualitative methods	2.50	3.18	0.68	3.39**
Quantitative analysis	2.29	2.91	0.62	2.55*
Quantitative methods	2.55	3.09	0.54	2.51*
Combinedknowledge score	2.05	3.00	0.95	6.37***

***p < 0.001

**p < 0.01

* p < 0.05

¹ Pre and post tests were not linked. Therefore independent t-test was used, however the assumption of independence between the two groups may be violated.



PARTICIPANT FEEDBACK

When asked to comment on their favourite aspect of the Summer Institute, the most common responses related to the case studies themselves. Several participants appreciated the hands on learning offered through the case studies as being a highly effective learning tool. They were seen as an effective way of demonstrating the practical aspects of evaluation process using 'real life' examples. The group process and collaborative nature of the team work were also felt to be highly beneficial by some.

"I really liked the case study process. This experience provided me with a concrete understanding of the evaluation process."

"I liked the case study group work best. The opportunity to go through the process of developing an evaluation framework with a real life project was very beneficial."

"The team work/case study work. I can look back on what our team got done in only 3-4 days of work with a real sense of accomplishment and achievement. Through the teamwork I have also met some great people and enlarged my network of people in the community."

Participants also stated that the information presented through lecture and workshops was useful and informative. The diversity of presenters was appreciated as providing a range of perspectives on the topic and maintaining interest. The quality of the presentations was highly rated and reflects the high scores above.

"The information: clear, concise, well presented information"

"A lot of very useful information"

"The information presented is very helpful in gaining knowledge, as well as utilizing the knowledge in the future"

"The quality of instruction; the presenters have such depth of theoretical knowledge and practical experience, it is very applicable and helpful information for my real life evaluation purposes"

Participants also liked the format of the Summer Institute as a week-long course that used a combination of lecture, workshops and group work. The use of various teaching methods and instruction responds to the diverse learning styles and helps keep participants engaged throughout the day. For example, one participant wrote that *"There was appropriate balance of group activity and lecture considering the amount of information which was covered."*

Having both community-based practitioners and university students participate in the Institute was beneficial. Participants appreciated an opportunity to connect with others and learn from a broad range of experiences and perspectives.





“I appreciated all of the different groups of people with varying experiences that were brought together to create this program. Their experiences and knowledge brought many different aspects to the learning process.”

“I enjoyed the mix of people in the institute”

“Fantastic opportunity for a community member (not a U of M student) to access this relevant, important learning”

RECOMMENDATIONS AND CONCLUSIONS

Opportunities for improving the Summer Institute were identified in the following areas:

1. Course content

While the diversity of participants experience is seen as valuable to the overall learning experience, it presents logistical challenges in terms of presenting relevant and appropriate level of information. This was evident in the range of comments that felt that the course content was both too advanced and too introductory. For example: One participant commented that *“this course was above my beginners understanding of program evaluation. I felt too embarrassed to tell anyone that I needed clarification”* yet others expressed a need for *“more vigorous content for graduate students.”* In order to address the disparate levels of experience within the group, it is recommended that:

- All participants (students and community-based practitioners) be given pre-assigned readings in preparation for the Summer Institute.
- The first half-day of lecture be focused on an Introduction to Evaluation that includes defining common terms and introducing the basic principles of Evaluation so as to ensure all participants have common understanding of evaluation.
- Where applicable, advanced level lectures and workshops be offered concurrent to introductory level lectures and workshops.

Additional suggestions for improving course content:

- Ensure that lecture/workshop content is more directly tied to the group work by basing examples on case studies or one common case.
- Provide more in-depth information in workshops.
- Present a common framework at the outset and provide templates for participants to work from to increase consistency and save time.
- Provide practical examples of an actual logic-model and evaluation framework.
- Offer more practical instruction on methods, addressing ethics and using technology/software in evaluation.
- Provide more descriptive information about the workshops ahead of time so that participants can make decisions about which session would be most appropriate for them to attend.
- Make readings list and resources available to all participants prior to the Institute.

2. Format

Participants appreciated the week long format. For students, the condensed format was appreciated. Some students indicated that additional pre-reading or a pre-course session to introduce students to the topic



would have been helpful. Afternoon workshops were difficult in terms of keeping focused on the material presented. Several participants commented that spending afternoons in group sessions would be preferable as this is a more engaging time and easier to keep focused on. As well, linking workshop content to group work would have been beneficial.

“Large group workshops could be more focused and integrated across sessions to help us with our group work (i.e. links between intro to evaluation and evaluation questions; indicator development and evaluation designs could be made more explicit to help with group work. Indicators information was not integrated into 7 step process & has been hard to integrate into group work.”

“We could switch the order of lectures and teamwork. I think it may be beneficial to lecture in the morning when people are fresh and awake and move the team workshops to the afternoon. The small groups and interactive process keeps people awake and active. It is challenging to stay alert and focused on lectures in the afternoon after a full and satisfying lunch!”

Additional suggestions for improving the format include:

- Include more lectures from people working in the field.
- Provide more information, resources, readings well ahead of time to give all participants opportunity to prepare.
- Allow participants to select workshop topics and case studies ahead of time rather than assigning them.
- Provide more time within workshops and lectures for in-depth discussion on the topic.

3. Case Studies

The case studies and small group work are an integral part of the Institute. Based on participant feedback, the cases studies were highly valued as an instructional tool and opportunity to connect with others. That said, participants provided the following suggestions specific to improving the case study process.

Several participants stated that they would have liked to have more clarification and direction on the case study process: *“Give more instruction for team work, like guidelines, where we should be at the end of each session”*; *“Written instructions for the team task –not steps, but the nuts & bolts –what do you want us to do –what do you expect in the end.”*

In planning the case studies, the planning committee wanted to allow the groups the opportunity to negotiate the process in a fluid and organic manner with little structure. This approach requires participants to negotiate through the confusing aspects of evaluation planning and is, in itself, a learning process. However, to effectively navigate a fluid process requires careful and effective facilitation which may have been lacking for some groups. In the future, it will be important to identify and provide the appropriate balance between fluidity and structure while providing all small group facilitators with proper tools and training for facilitating the case studies. In order to do this it is recommended that:

- Small groups be provided with more detailed instruction on the steps in evaluation planning, optional tools for completing the steps and a recommended timeline for moving through the steps.
- Facilitators be provided with a manual that will assist them to move participants through the case study in a way that supports group process and decision making, promotes in-depth discussion while keeping the group moving through the evaluation planning steps.





- Provide groups with a template PowerPoint with headings to ensure that the final presentations are consistent and capture the key information required.





APPENDIX A

2011 SUMMER INSTITUTE IN PROGRAM EVALUATION AGENDA

Time	Monday, June 13	Tuesday, June 14	Wednesday, June 15	Thursday, June 16	Friday, June 17	Time	
8:30	Opening Session	Participatory Evaluation/CBR Methods <i>Lawrence Deane</i>	Systematic Reviews as Program Theory <i>Javier Mignone</i>	Ethical Challenges in Evaluation <i>Heather Buchanan & Wayne MacDonald</i>	Team Work Day 4	8:30	
8:45							
9:00	Introduction to Program Evaluation <i>Javier Mignone</i>	Instructions for Team Work	Discussion of Team Work	Discussion of Team Work		9:00	
9:15		Break	Break	Break		9:15	
9:30	Break	Team Work Day 1	Team Work Day 2	Team Work Day 3	Team 1 Presentation	9:30	
9:45						Team 2 Presentation	9:45
10:00	Introduction to Program Evaluation <i>Javier Mignone</i>				Team 3 Presentation		Lunch break
10:15						Team 4 Presentation	
10:30	Lunch break	Team 5 Presentation	Team 6 Presentation	Team 7 Presentation	10:30		
10:45					Team 6 Presentation	10:45	
11:00	Lunch break	Team 7 Presentation	Team 7 Presentation	Wrap-up & Evaluation		11:00	
11:15					Team 7 Presentation	11:15	
11:30	Lunch break	Team 7 Presentation	Team 7 Presentation	Wrap-up & Evaluation		11:30	
11:45					Team 7 Presentation	11:45	
12:00	Lunch break	Team 7 Presentation	Team 7 Presentation	Wrap-up & Evaluation		12:00	
12:15					Team 7 Presentation	12:15	
12:30	Lunch break	Team 7 Presentation	Team 7 Presentation	Wrap-up & Evaluation		12:30	
12:45					Team 7 Presentation	12:45	
1:00	Indigenous Methodologies <i>Margaret Kovach</i>	Evaluating the Evaluators: Role Play <i>Roger Miranda</i>	Evaluating the Evaluator: Role Play <i>Roger Miranda</i>	Reporting & Use of Evaluation Findings <i>Bohdanna Kinasevych</i>		Team 4 Presentation	1:00
1:15					Team 5 Presentation		1:15
1:30	Things Evaluators Do Not Like to Hear to Hear <i>Roger Miranda</i>	Break	Break	Break		Team 5 Presentation	1:30
1:45					Team 6 Presentation		1:45
2:00	Reception	Indicator Development <i>Javier Mignone</i>	Quantitative Methods <i>Bohdanna Kinasevych</i>	Advanced Quantitative Methods <i>Aynslie Hinds</i>		Team 6 Presentation	2:00
2:15					Team 7 Presentation		2:15
2:30	End of Day	End of Day	End of Day	End of Day		Team 7 Presentation	2:30
2:45					Team 7 Presentation		2:45
3:00	End of Day	End of Day	End of Day	End of Day		Wrap-up & Evaluation	3:00
3:15					Team 7 Presentation		3:15
3:30	End of Day	End of Day	End of Day	End of Day		Wrap-up & Evaluation	3:30
3:45					Team 7 Presentation		3:45
4:00	End of Day	End of Day	End of Day	End of Day		Wrap-up & Evaluation	4:00
4:15					Team 7 Presentation		4:15
4:30	End of Day	End of Day	End of Day	End of Day		Wrap-up & Evaluation	4:30
4:45					Team 7 Presentation		4:45
5:00	End of Day	End of Day	End of Day	End of Day		Wrap-up & Evaluation	5:00
5:15					Team 7 Presentation		5:15

