

# Texas Evaluation Network Institute 2021



**Online — October 7-8, 2021**

**Registration Information**



## Join Us This Fall!

If you are looking for a place to learn the basics of evaluation or improve your skills as an evaluator, then the Texas Evaluation Network (TEN) 2021 Institute is for you. The theme for the 2021 Virtual Evaluation Institute is **EQUITY IN EVALUATION: HOW EVALUATORS CAN MEASURE, EMBED, AND ADVOCATE FOR EQUITY IN OUR WORK**. This year's institute will once again include our *Evaluation 101* session along with theme-related sessions about practices or experiences with including equity in evaluations. The 2021 TEN Institute is sure to have something for you as an evaluation professional.

From the topics listed below, you have the ability to register for a single session, a single day, or participate in all sessions following the introductory or the theme-base/intermediate skill-level tracks. Thursday evening includes a virtual opportunity to network with your evaluation peers attending the Institute in a relaxed atmosphere.

Day	Time Block (CDT)	Evaluation 101 Workshops	Theme-based or Intermediate-level Workshops	
Thursday, October 7	9:00-10:00	Measuring the Success of Your Program	Evaluation, Advocacy and Policy	
	10:00-11:00			
	11:00-Noon		Equity in Action	
	Time for Lunch			
	1:00-2:00		Equity Practices in Philanthropy	
	2:00-3:00			
	3:00-4:00		Using Your Data to Address Disparity	
	4:00-6:00	KEYNOTE: Shiree Teng on Equity		
	6:00 - 7:00	Virtual Happy Hour		
Friday, October 8	9:00-10:00	Evaluating Your Programs	Improving Needs Assessment	Conducting Focus Groups
	10:00-11:00			Designing Culturally Responsive Evaluations
	11:00-Noon	Diversity, Equity, & Inclusion		
	Noon-1:00			
	1:00-2:00		Becoming an Independent Consultant	
	2:00-3:00			
	3:00-4:00		Creating Dynamic Dashboards in Excel	
	4:00	Closing Session		



# Workshop Descriptions

## Introductory-level Workshops

**Evaluation and Outcomes: Measuring the Success of Your Program** (*Thursday, 9:00-11:00 AM*). Presenters will provide an overview of program evaluation and guide attendees through a nine-step process on how to evaluate programs and measure outcomes. The presenters will also share an example of a completed program evaluation. This session is an introductory course and intended for individuals without program evaluation experience. *PRESENTERS: Dr. Nancy Correa & Dr. Beth Van Horne, Texas Children's Hospital.*

**Evaluating Your Programs** (*Friday, 9:00-11:00 AM*). Attendees will learn about eight basic components needed in order to measure any aspect of their program. For example, the application of these components will lead an organization to a better understanding of their internal functioning as well as a clearer understanding regarding the effectiveness of the services that are being provided by that program. The training will include an overview of these eight components and then attendees will choose which components they would like to focus on and an application for that component will be facilitated by the trainer. Attendees should come ready to work on one or more of the following components for their program/organization:

1. Change Theory
2. Problem/Vision Statement
3. Logic Model/Monitoring and Evaluation
4. Evaluation Design Figures
5. Data Management Strategy
6. Fidelity Plan
7. Reporting to Constituents
8. Making Program Adjustments

A poll will be taken after the overview and the component(s) chosen most by attendees will be worked on together. *PRESENTER: Jon Meyer, JLM Research and Evaluation.*

**Diversity, Equity & Inclusion** (*Friday, 11:00 AM-Noon*). Diversity, Equity, and Inclusion (DEI) is a phrase that has become increasingly popular as our country works to become better for all who live here. This includes people who have been overlooked, under-resourced, and marginalized throughout history. Diversity, equity, and inclusion are important because people deserve better. By promoting individual awareness of DEI, we can work to cultivate the lives of individuals, as well as improve organizational culture. Providing a more rounded, more inclusive culture for individuals is an essential step in improving overall employee engagement and morale. *PRESENTER: Lenola Tutt, Trainer/Consultant, Essential Elements, Kensington, Maryland and Adjunct Faculty in the Department of Social Work at Stephen F. Austin State University.*

## Theme-based Intermediate Workshops

**Evaluation, Advocacy, and Policy** (*Thursday, 9:00-10:00 AM*). Child care centers, already some of the most economically vulnerable businesses in Texas, provide an essential service to working families and critical early education for young children. In a statewide analysis of Texas Health and Human Services data containing operational status of child care centers from March to August of 2020 across 8,000 child care centers. Children At Risk evaluated the impact of the COVID-19 pandemic on the supply of child care in Texas. Throughout the pandemic, closures have left thousands of Texan families without access to reliable child care. In particular, the pandemic disproportionately worsened access to quality child care for communities of color. With the targeted use of this research, several bills passed into law during the 87th Texas legislative session. These new laws, going into effect in 2021, increase access to quality affordable young children living in low income families and strengthen the ECE workforce. CHILDREN AT RISK will review the role of evaluation in the policy and advocacy process from start to finish using the child care closure analysis conducted during the pandemic with emphasis on the effect on low income families and communities of color. This session will cover the planning process, determining the best approach for future advocacy work, the data request process, the determination of methodologies, convening stakeholders and receiving input (with particular interest in feedback regarding equity), software used, review output, discuss findings and interpretation, and how these results were used to inform and educate legislators during the legislative session. *PRESENTER: Sara Moran, Associate Director, CSME, Children At Risk.*



**Equity in Action** (*Thursday, 11:00 AM-Noon*). Many conversations about centering equity in evaluation remain theoretical without concrete examples of what equity-focused approaches can look like in practice. Staff from Good Reason Houston, Equivolve Consulting, and Houston Endowment will discuss their approach to centering equity in a current evaluation capacity building project through relationship building, power sharing, and continuous learning. We will discuss how equity was integrated throughout the RFP development process, consultant selection, project design & planning, and implementation. The example evaluation project's goal is to develop an organizational evaluation framework for Good Reason Houston, a non-profit organization launched in 2018, and develop and carry out an evaluation capacity building plan. This project is a unique partnership between a nonprofit, philanthropic foundation, and external evaluation consultant to strengthen impact measurement and apply findings to the citywide nonprofit landscape. Discussion questions will broadly fit into three categories: (1) Each organization's equity journey a. Example question: Please tell us about your organization's trajectory on its equity journey. How did this lead to engaging with this project?; (2) Project idea and RFP process. Example question: Please tell us how you worked to center equity while developing the RFP. What would you do differently next time? (3) Project design and implementation a. Example question: How was an equity-focus represented in the evaluation proposal? How does this look in practice? Time will be reserved for participants to ask questions to the panel. **PANEL FACILITATOR:** Luna Nguyen, *Learning and Strategy Lead, Good Reason Houston*.

**Equity Practices in Philanthropy** (*Thursday, 1:00-2:00 PM*). As the social sector reckons with racial inequities, solution-oriented conversations tend to focus on programmatic leadership or equity in funding. Trailing behind are the implications for learning and evaluation practice. During a recent staff-wide racial equity training, Houston Endowment staff learned about and applied the Race Matters Institute and Just Partner's Racial Equity Impact Analysis Tool. The tool poses a series of questions that can be applied to various organizational policies such as job descriptions, requests for proposals, and more. Houston Endowment's Learning and Evaluation team, in the midst of reflecting on how it can better operationalize equitable practices, applied the tool to external-facing projects (RFPs, website language, etc.) and used the analysis for continued improvement. This workshop will provide an overview of the tool, a case study on its application in a philanthropic context, and provide space for participants to apply the REIA to a data collection tool. To wrap up, participants will consider opportunities to apply the tool in their own work. **PRESENTERS:** Aaron Cano and Patrick Moreno-Covington, *Houston Endowment*.

**Using Your Data to Address Disparity** (*Thursday, 3:00-4:00 PM*). Organizations collect a lot of data about their clients, but rarely use it. Building on lessons we have learned working with More Inclusive Health, an organization focused on forging culturally responsive healthcare, this session will talk about how evaluators and organizations can use organizational data to identify disparities in outcomes. Once disparities are identified, organizations can have more targeted and effective conversations about what is driving those disparities, and how to revise their services or programs to improve outcomes for people of color. We will share an example of how this approach was taken with significant improvements to maternal health outcomes in Houston, and will share how evaluators can use this approach with any project to keep equity as a component in all of their evaluations. Time will be reserved for discussion. **PRESENTERS:** Jessica Pugil, Kemi Nnaji, & Bret Sinclair.

**Improving Needs Assessment** (*Friday, 9:00 AM - Noon*). Dayton, Ohio wanted to reduce drug related deaths via an understanding of needs and community assets and Ohio's Governor advocated a similar strategy for the opioid crisis. Columbus Ohio is following a similar needs and asset-based approach for revitalizing major urban areas that are in long term decline. Since evaluators are not trained in Needs Assessment (NA), Asset/Capacity Building (A/CB), and/or combinations thereof (LaVelle, 2014), this session focuses on a brief overview of each and a hybrid framework that integrates the two processes. Participants will work on a real-world scenario (in downloaded handouts). Literature examples, questions, and interactions are included in scheduled activities. **PRESENTER:** Dr. James Altschuld, *Professor Emeritus of Educational Studies, The Ohio State University*.

**Conducting Focus Groups** (*Friday, 9:00-11:00 AM*). Creating Great Focus Groups is designed for new and emerging evaluators. Participants will receive an overview of focus groups, their benefits and limitations, and the mechanics for creating and executing them. The following will be covered in this session: (1) Focus Group—why use them?; (2) maximizing their use; (3) creating an environment that honors all voices; (4) developing your protocol or facilitator guide; (5) hosting and executing great focus groups; (6) preparing and summarizing your findings; (7) analyzing your data; and (8) communicating your results with clients and stakeholders. At the conclusion of this workshop, participants will have a well-developed framework that will support the creation of great focus groups and improve future focus groups. Participants will learn how to create a meaningful experience for their focus group participants and their stakeholders. **PRESENTER:** Dr. Rhonda Williams, *Deputy Director, Communities Foundation of Texas*.





**Designing Cultural Responsive Program Evaluations** (Friday, 11:00 AM - 1:00 PM). At Play for Change, we understand how racism negatively impacts our health, peace of mind, education, and employment opportunities amongst other aspects of our lives. We also know and have experienced the backlash from challenging white-normative culture in professional settings and have organized ourselves as an evaluation firm by and for black, indigenous and people of color (BIPOC) to counteract this. At the heart of our practice is showing up for communities and collecting data in ways that don't replicate historical trauma while honoring the voices of BIPOC. Through our failures, and a continuous growth and renewal process we've finally learned to incorporate culturally responsive approaches into our practice. These approaches are well documented on the web, accessible to all, and make for more meaningful program evaluation. We propose doing a highly participatory professional development workshop where, as a group, we design a program evaluation from a culturally responsive lens. We will screen-share a partially outlined scope of work with the design, data collection, analysis and reporting stages already populated. We will then draw on experiences from the group to make each of these phases more culturally responsive. Where we feel there is a gap we will plug in our own recommendations to the scope of work. We will end the workshop with a focused conversation amongst the group on lessons and key take-aways for applying culturally responsive practices to their own work. *PRESENTER: Kamaladevy Sivalingam, Founder and CEO of Play for Change.*

**Becoming an Independent Consultant** (Friday, 1:00-3:00 PM). As a program evaluator, are you thinking about developing an independent consulting practice? For many, this is an exciting but intimidating prospect. This professional development workshop will consider three key start-up skills needed for success: (a) consulting attributes; (b) identifying a niche (i.e., a target market); and (c) marketing to an evaluation audience. Participants will leave with an understanding for whether they are ready to start consulting, organizations and individuals they should target, and the start to a marketing plan. Matt Feldmann, Ph.D. will lead this important introductory workshop that has been foundational to the development of many consulting practices. Matt is a former AEA Independent Consulting (IC) Topical Interest Group (TIG) Chair, he teaches the IC pre-conference workshops at the AEA conference, the AEA eStudy on Independent Consulting, and has developed a weekly IC Topic Chat series. The IC Topic Chat sessions have convened 60+ times most weeks since May 2020 and covered every conceivable consulting topic from marketing and cost estimation to time maximization and contract negotiations. *PRESENTER: Dr. Matt Feldmann, Principal Researcher and Firm Director, Goshen Education Consulting.*

**Creating Dynamic Dashboards in Microsoft Excel®** (Friday, 3:00-4:00 pm). Creating dynamic dashboards in Microsoft Excel is a fantastic and cost-effective way to view important data with minimal construction time. This workshop takes you through all you need to know to design interactive dashboards from start to finish. This skill-building workshop will demonstrate how to generate an interactive dashboard in five easy-to-learn steps: Pivot, Analyze, Rename, Chart, and Slice. Using sample survey data, you will learn how to (a) use a Pivot table to analyze data; (b) create a chart using PivotCharts; (c) incorporate Slicers, and (d) create a professional looking dashboard that allows stakeholders to slice-and-dice the data in seconds. After attending the workshop, you will be equipped with clear steps that you can immediately implement to create stunning dashboards that are dynamic and easy to reproduce. *PRESENTER: Shelly Engelman, Principal Consultant, Custom EduEval LLC.*

## Special Sessions

**Keynote Address by Shiree Teng** (Thursday, 4:00-6:00 PM): Shiree Teng, author of *Measuring Love on the Journey for Justice: A Brown Paper* will be our keynote speaker. Ms. Teng has been doing work to address racial equity and advance social justice for several years and has some interesting and thought-provoking ideas she will share with us.

**Virtual Happy Hour** (Thursday, 6:00-7:00 PM). While people focus on social distancing and self-isolating in an attempt to flatten the curve of coronavirus which moved this Institute to an online format for the second year, it does not mean we can't end our busy first day with a little happy time. So grab your favorite libation or a snack, and catch up with everyone - from across town, or across the world.

**Closing Session** (Friday, 4:00 PM). Join TEN Board President Dr. Emmerentie Oliphant and other Directors in this wrap-up session and discussion of the future direction of TEN.



## Is This It?

The Texas Evaluation Network (TEN) is more than an Institute. Devoted to strengthening ties through educational and professional development, TEN seeks to promote evaluation methods and principles; advocate for evaluation best practices; strengthen evaluation capacities; provide professional/career development opportunities, and institute a venue for networking and the exchange of theoretical, methodological and practical knowledge related to the field of evaluation. Contact us on how to join and become more involved with TEN at <https://www.texasevaluationnetwork.org>



## Recharge Year Round!

Once a year networking and professional development just isn't enough! TEN offers two additional means to stay professional charged throughout the year. These lunchtime sessions are conducted via Zoom in two different formats. Networking sessions utilize breakout rooms to discuss current topics or issues related to evaluation. Power Hours are a brief presentation by a speaker on selected a topic with time for Q&A before the hour ends.



## Finally, the 2021 Theme Does Not End Here

People need new ways to think about and talk about diversity. Evaluators and leaders need new skills to enable equity and inclusion in all spaces and places. We all need scalable ways to ensure that diversity and inclusion initiatives are successful. Find ways to reveal opportunities, elevate equity, activate diversity, and lead inclusively. When you do, share so all can learn from and celebrate your success!

