

Jonathan A. Morell



Bio

Jonathan A. Morell (Jonny) is an organizational psychologist who spends his professional life trying to integrate hands-on evaluation work and theoretical interests in evaluation methodology. As a practitioner he evaluates organizational change, R&D, and safety programs. His theoretical interests include the nature and use of logic models, the role of Lean Six Sigma methodologies in evaluation, complex system behavior, and the nature of practical action. His present focus is on trying to answer two questions. How can the integrity and power of evaluation be maintained in the face of unexpected behavior in programs and their evaluations? What would ensue from a tight integration of agent based modeling and traditional evaluation methods? Jonny is a long standing member of AEA, where he has been instrumental in founding two of their topical interest groups – Systems, and Business and Industry, and is a recipient of their Marcus Ingle Distinguished Service Award. Jonny is the editor of the international journal *Evaluation and Program Planning*. His latest book is *Evaluation in the Face of Uncertainty: Anticipating Surprise and Responding to the Inevitable*.

Workshop title

Maintaining evaluation power and integrity in the face of unexpected change

Target audience

- 1) Evaluators with some experience in doing evaluation
- 2) Evaluation sponsors who wish to assure evaluations that will be sensitive to unexpected program outcomes
- 3) Faculty members and teachers of evaluation

Level

Intermediate

Workshop content

All evaluators deal with unintended events that foul their evaluation plans. Either the program does not work as planned, or the evaluation does not work as planned, or both. Usually we treat these situations as crises. This workshop steps back from crisis mode and presents a systematic treatment of why these situations occur, tactics that can be used to anticipate and respond to problems, and an explanation of why caution is needed because anything we do to minimize the effect of surprise may cause of other difficulties. The intent of the workshop is twofold. First, to provide individual attendees with skills and knowledge they can employ in their own practice. Second, to further a community of interest among evaluators dedicated to developing systematic understanding of the phenomenon of unanticipated events that threaten the integrity of evaluation.

Workshop programme

Start	End	Topic	Activity
9:00	9:30	Introductions among workshop attendees <ul style="list-style-type: none"> ▪ Name ▪ Experience with evaluation ▪ Expectations for the workshop ▪ Identification with any experience with unexpected behavior in programs or their evaluations 	<ul style="list-style-type: none"> ▪ Discussion among all participants
9:30	9:45	Historical context and scope of workshop content	<ul style="list-style-type: none"> ▪ Lecture
9:45	10:00	Similarity of surprise in programs and their evaluations	<ul style="list-style-type: none"> ▪ Lecture ▪ Class discussion
10:00	10:30	Estimating how much surprise to expect	<ul style="list-style-type: none"> ▪ Lecture
10:30	10:45	Break	
10:45	11:15	The continuum from "foreseeable" to "impossible to predict"	<ul style="list-style-type: none"> ▪ Lecture
11:15	12:00	Empirical findings on unexpected behavior in programs and their evaluations <ul style="list-style-type: none"> ▪ Life cycle framework ▪ Social/organizational framework ▪ Other categorizations 	<ul style="list-style-type: none"> ▪ Lecture ▪ Breakout session – discuss, challenge analysis, findings and interpretation ▪ Reassemble, report out, discussion
12:00	1:00	Lunch	
1:00	1:50	Tactics useful toward the "foreseeable" end of the continuum	<ul style="list-style-type: none"> ▪ Lecture ▪ Case presentation to group ▪ Breakouts to discuss application of tactics to case ▪ Report back, discussion
1:50	2:40	Tactics useful in the middle of the "foreseeable" end of the continuum	<ul style="list-style-type: none"> ▪ Lecture ▪ Case presentation to group ▪ Breakouts to discuss application of tactics to case ▪ Report back, discussion
2:40	2:55	Break	
2:55	3:45	Tactics for agile to use when change is impossible to predict	<ul style="list-style-type: none"> ▪ Lecture ▪ Case presentation to group ▪ Breakouts to discuss application of tactics to case ▪ Report back, discussion
3:45	4:35	Tradeoffs between efforts to reduce surprise and new problems introduced by those efforts	<ul style="list-style-type: none"> ▪ Lecture ▪ Case presentation to group ▪ Breakouts to discuss implications of proposed surprise reduction methods ▪ Report back, discussion
4:35	5:00	Wrap up, evaluation	Class discussion