



JC 10/11/09

## CORE 676 A/B

Consultation and Evaluation in  
Human Services and Systems

### Instructor and Course Information

<b>COURSE:</b>	CORE 676	<b>INSTRUCTOR:</b>	Anne Hughson
<b>TERM:</b>	Fall 2009 & Winter 2010	<b>TELEPHONE/FAX:</b>	(403) 220-6273/6494
<b>SECTION:</b>	L01 / B01	<b>EMAIL:</b>	blackboard
<b>DATE/TIME:</b>	September 14 – 17, 2009 January 11 – 13, 2010 April 12 – 14, 2010		
<b>LOCATION:</b>	FCJ Centre, Calgary		

### Course Description

Qualitative and quantitative evaluation research informs the design and implementation of a collaborative evaluation of a rehabilitation program, policy or system.

### Resources

Shaw, I., Greene, J. & Mark, M. (2006). *The SAGE handbook of evaluation*. SAGE Publications: Thousand Oaks, CA

### Suggested Readings

[On-line Articles:](#)

Abma, T. A. Responsive evaluation in health promotion: its value for ambiguous contexts. *Health Promotion International Advance Access*, June 21, 2005.

Abma, T. A., Stake, R.E. (2001). *Stake's Responsive Evaluation: Core Ideas and Evolution*. *New Directions for Evaluation*, no. 92, Winter 2001.

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Andrews, D.A., Robinson, D., & Balla, M. (1986). Risk principle of case classification and the prevention of residential placements: An outcome evaluation of the share the parenting program. *Journal of Consulting and Clinical Psychology*. 54(2), 203-207.

Austin, M.J., Weisner, S., Schrandt, E., Glezos-Bell, S., & Murtaza, N. (2006). Exploring the transfer of learning from an executive development program for human services managers. *Administration in Social Work*. 30(2), 71-90.  
Biklen, Douglas P. (1983). *Community Organizing: Theory and Practice*. Englewood Cliffs NJ: Prentice Hall.

Bonner, L. (2003). Using theory-based evaluation to build evidence-based health and social care policy and practice. *Critical Public Health*. 13(1) p 77.

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- Greene, J.C., Caracelli, V.J., & Graham, W. F. (1989). Toward a conceptual framework for mixed-method evaluation designs. *Educational Evaluation and Policy Analysis*, 11(3), 255-274.
- Hampshire, K., Hills, E., & Iqbal, N. (2005). Power relations in participatory research and community development: a case study from Northern England. *Human Organization*. 64 (4), p 340.
- House, E. & Howe, K. R. (2000). Deliberative democratic evaluation. In K. Ryan & L. DeStefano (eds) *New Directions for Evaluation*, (85), 3-12.
- Howard, D.C., J & Howard, P.A. (2000). Towards sustainability of human services: assessing community self-determination and self-reliance. *The Canadian Journal of Program Evaluation*. 15(1) p 25.
- Krumer-Nevo, M., & Barak, A. (2006). Service users' perspectives on the benefits system in Israel: A participatory action research. *Social Policy & Administration*. 40(7), 774-790.
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### Books:

- Atkin, M. (ed.) (2004). *Evaluation Roots: Tracing theorists; views and influences*. Thousand Oaks, CA: Sage.
- Barnes, C.A. (1992). *Critical Thinking: Educational Imperative*. San Francisco: Josey-Bass Publication.
- Bogaert, M.V.D., Ghagat, S. and Fam, N.B. (1985). "Participatory Evaluation of an Adult Education Programme" in Walter Fernandes and Rajesh Tandon (eds.). *Participatory Research and Evaluation – Experiments in Research as a Process of Liberation*. pp. 172-182. New Dehli: Indian Social Institute.
- Bogdan, R.C. & Biklen, S.K. (1992). *Qualitative Research for Education*. Toronto: Allyn and Bacon.
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- Chen, H. (1990). *Theory-Driven Evaluation*. Beverly Hills: Sage.
- Chen, H-T (2005). *Practical Program Evaluation: Assessing an improving planning, implementation, and effectiveness*. Thousand Oaks, CA: Sage.
- Cook, T.D. & Reichardt, C.S. (1979). *Qualitative and Quantitative Methods in Evaluation Research*. Thousand Oaks, CA: Sage.
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- Gadamer, H.-G. (1981). *Reason in the Age of Science* (F. G. Lawrence, trans.). Cambridge, MA: MIT Press.
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- Guba, E. (1990). The alternative paradigm dialog, In E. Guba (ed.), *The Paradigm Dialog*. Newbury Park: Sage.

- Hall, G. E. & Hord, S.M. (2001). *Implementing Change*. Boston: Allyn and Bacon.
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- Herman, J.L., Morris, L.L. & Fitz-Gibbon, C.T. (1987). *Evaluator's Handbook*. Newbury Park, CA: SAGE Publications.
- Holstein, J.A. & Gubrium, J.F. (2003). Active interviewing. In J.F. Gubrium & J.A. Holstein (eds) *Postmodern Interviewing* (pp 67-80). Thousand Oaks, CA: Sage.
- Isenberg, D.H., Loomis, C., Humphreys, & K., Maton, K.I. (2004). Self-help research: Issues of power sharing. In L. Jason, (Ed). *Participatory community research: Theories and methods in action*. Chpt 7 Washington, DC: American Psychological Association
- Kvale, S. (1996). *Interviews*. Thousand Oaks. CA: Sage.
- King, J.A., Morris, L.L., & Fitz-Gibbon, C.T. (1987). *How to Assess Program Implementation*. Newbury Park, CA: SAGE Productions.
- Lincoln, Yvonna, S. and Guba, Egon G. (1985). *Naturalistic Inquiry*. Beverly Hills, California: SAGE Publishing Inc.
- Maio, G. R., & Olson, J. M. (eds) (2000). *Why We Evaluate: Functions of attitude*. Mahwah, NJ: Erlbaum.
- Mark, M. M., Henry, G. T., & Julnes, G. (2000). *Evaluation: An integrated framework for understanding, guiding, and improving public and nonprofit policies and programs*. San Francisco. CA: Jossey-Bass.
- Mertens, Donna M. (1998). *Research Methods in Education and Psychology*. SAGE Publications, Inc
- Mitchell, J. (1990). Policy Evaluation for Policy Communities: Confronting the Problem. *Evaluation Practice*, 11(2), pp. 109-114.
- Morgan, D.L. (1988). *Focus Groups as Qualitative Research*. Newbury Park, CA: SAGE Publications.
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- Oliver, M. (1990). *The Politics of Disablement*. London: MacMillan Education Ltd.
- Patton, M.Q. (1987). *How to Use Qualitative Methods in Evaluation*. Newbury Park, CA: SAGE Publications.
- Patton, M.Q. (1990). *Qualitative Evaluation and Research Methods* (2<sup>nd</sup> ed.) London: SAGE Publications.
- Patton, M. Q. (1997). *Utilization-Focused Evaluation: The new century text*. Thousand Oaks, CA: Sage.
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- Rogers, P.J., Hacsí, T.A., Petrosino A., Huebner T.A.,(2000) *Program Theory in Evaluation Challenges and Opportunities: New Directions for Evaluation*, No. 87
- Rossi, P.H., & Freeman, H.E. (1985). *Evaluation, a systematic Approach*, third edition. Thousand Oaks, CA: Sage.
- Scriven, M. (1991). *Evaluation Thesaurus*, fourth edition. Thousand Oaks, CA: Sage.
- Schwandt, T.A. (2002). *Evaluation Practice Reconsidered*. New York: Peter Lang.
- Sechrest, L. & Scott, A. (eds) (1993). *Understanding Causes and Generalizing About Them. New Directions for Evaluation*, No. 57. San Francisco, CA: Jossey-Bass.
- Shadish, W.R., Cook, T.D., & Leviton, L.C. (1991). *Foundations of Program Evaluation: Theories of practice*. Newbury Park, CA: Sage.
- Shadish, W.R., Cook, T.D., & Campbell D.T. (2002). *Experimental and Quasi-experimental Designs for Generalized Casual Inference*. New York: Houghton Mifflin.
- Silverman, D. (2001). *Interpreting qualitative data*, 2<sup>nd</sup> edition. London: Sage.
- Tashakkori, A. & Teddlie, C. (1998). *Mixed Methodology: Combining qualitative and quantitative approaches*. Thousand Oaks, CA: Sage.
- Stecher, B.M. & Davis, W.A. (1987). *How to Focus an Evaluation*. Newbury Park, CA: SAGE Publications.
- Taylor, D., & Balloch, S. (2005) (Eds). *The politics of evaluation: Participation and policy implementation*. Bristol: Great Britain: Policy Press.
- Unrau, Y.A. (2001). Using client exit interviews to illuminate outcomes in program logic models: a case example. *Evaluation and Program Planning*. 24(4), 353-361.

Further readings will be supplied during the term

## Course Goals

- Evaluate programs by determining appropriate evaluation methodologies.
- Examine philosophy, goals and effects on outcome research.
- Implement a data collection system.
- Identify management and organizational implications.
- Outline a cost analysis and cost benefit plan.

## Learner Objectives

- Conceptual base and linkage between interdisciplinary and inter-agency needs assessment.
- Service design.
- Program development.
- Service delivery systems.
- Program models.
- Data collection.
- Cost analysis and cost benefit.
- Risk management models.
- Social action research.
- Evaluation methodologies

## Academic Integrity

The Department of Community Health Sciences expects **intellectual honesty** from its students. Course participants should be aware of University policies relating to Principles of Conduct, Plagiarism and Academic Integrity. These are found in the printed Faculty of Graduate Studies Calendar, or online under Faculty Regulations in the Faculty of Graduate Studies Calendar, or at [www.ucalgary.ca/pubs/calendar/current/how/How\\_LB.htm](http://www.ucalgary.ca/pubs/calendar/current/how/How_LB.htm).

## Cut Points For Grades

*This course adheres to the grading system outlined in the University of Calgary, Faculty of Graduate Studies Calendar. Percentage/letter-grade conversions are standard for courses in the Department of Community Health Sciences.*

<i>Grade</i>	<i>Course %</i>	<i>Grade Point Value*</i>	<i>Graduate Description*</i>
<i>A+</i>	<i>97-100</i>	<i>4.0</i>	<i>Outstanding</i>
<i>A</i>	<i>90-96.5</i>	<i>4.0</i>	<i>Excellent</i>
<i>A-</i>	<i>85-89.5</i>	<i>3.7</i>	Very good performance
<i>B+</i>	<i>77-84.5</i>	<i>3.3</i>	Good performance
<i>B</i>	<i>72-76.5</i>	<i>3.0</i>	Satisfactory performance
<i>B-</i>	<i>68-71.5</i>	<i>2.7</i>	Minimum pass for students in the Faculty of Grad Studies
<i>C+</i>	<i>63-67.5</i>	<i>2.3</i>	All grades below B- are indicative of failure at the graduate level and cannot be counted toward Faculty of Graduate Studies course requirements.
<i>C</i>	<i>60-62.5</i>	<i>2.0</i>	

## Late Assignments

- Assignments are due on the specified date by 9 AM. Students who hand in assignments late will be penalized 5% per day for handing in late. Assignments that are handed in 14 calendar days or more after the due date will be refused and the students assigned a score of zero for the assignment.
- Students may hand in assignments late without penalty under the following circumstances:
  - The student has discussed the timelines with course instructor in advance of the due date and the course instructor has granted an extension
  - There is a valid health or family emergency such as is discussed under the University regulations for deferral of final examinations. Students may be required to provide the Course Coordinator with such documentation related to illness and/or emergency as is discussed and required in the University regulations pertaining to deferral of final examinations. This information can be found in the University Calendar.

## Evaluation Plan

- 1. Seminar presentation** **50%**  
*Breakdown:*
  - a) Seminar oral presentation 25% **Due Date: January 11-13, 2010**
  - b) Seminar paper 25% **Due Date: January 29, 2010**
- 2. Practicum report** **50%**  
*Breakdown:*
  - a) Oral presentation 10% **Due Date: April 12-14, 2010**
  - b) Final report 40% **Due Date: April 23, 2010**

### Appendix 1

#### *Student Guidelines: Negotiation for Practicum Evaluation Project*

You may wish to include a brief resume of your background(s) by way of introduction and explanation of this as a graduate course at U of C (CRDS program) including my contact information as course instructor.

**Introduction and Purpose:** including a brief description of the program/service as background to explaining the purpose and scope of the proposed evaluation process.

#### *Evaluation Process*

- **Evaluation Design:** *this might include the identification of stakeholders, development of methodology and evaluation questions, review of documents as well as description of any instruments you might use or design.*
- **Data Gathering:** *includes how you will gather data, from whom, as well as indication of review and analysis of literature on best principles and practices relevant to the evaluation purpose and questions.*
- **Analysis and Reporting of Evaluation Findings:** include an indication of timelines for providing draft report for circulation to ensure accuracy of information, and intention to provide final report after incorporating feedback at the end of April.
- **Deliverables and projected timelines:** include the timelines for phases of the project (i.e. data collection phase, analysis of findings, write up, etc.) as well as anticipated oral presentation and delivery of final report.

### Appendix 2

#### SEMINAR TOPICS

#### **INSTRUCTIONS:**

Students will prepare and present a seminar paper on one of the following topics. Some topics are large enough to lend themselves to collaborating with another student. This seminar presentation will provide an opportunity for

colleagues to learn from each other about specific aspects and issues of evaluation research and consultation. A written outline and overview of materials will be required for the seminar presentation and should be circulated in advance to allow other students to prepare for discussions. This should include copies of any graphical material and include a comprehensive list of current references. Students are invited to discuss the preparation of this seminar in advance with the instructor. At the time of their one hour presentation, students are expected to teach the material to their peers and should make notes on feedback comments and advice from fellow students and incorporate those into the final seminar paper submission.

**Marking criteria: SEMINAR PAPER (total worth 25%, each criterion worth 5%)**

1. Analysis/synthesis of main constructs
2. Coherent discussion of theory and practice
3. Relevant and current review of literature
4. Organized and clearly written
5. Critical appraisal of current practices/issues

**SEMINAR TOPICS PRESENTATION SCHEDULE**

STUDENT(S)	DATE	TOPIC
		Compare and contrast the major principles that guide the evaluator to conceptualize a request for program evaluation - needs assessment, summative, formative, emphasis on process and outcome, etc. - how to get to the question
		An examination of major approaches to program evaluation in human services, which lens to use: <ul style="list-style-type: none"> <li>• Experimental Design</li> <li>• Empowerment evaluation</li> <li>• Inclusive Evaluation</li> <li>• Goal-free Evaluation</li> <li>• Utilization - oriented evaluation</li> </ul>
		How to gather information for purposes of evaluation - discuss the methods of sampling, naturalistic inquiry, qualitative (interview, observation, etc) and quantitative (test measures, surveys, file data, etc) methods with an emphasis on the issues leading to differing results
		How to communicate Evaluation Findings - discuss the implications for funders, stakeholders, decision-makers, etc.
		Ethical responsibilities and duties in conducting program evaluation and consultation in human services
		An exploration of evaluation issues in the context of social policy, human resource development and current resource allocation that effect the implementation of community based programs
		Discuss the role of program evaluation in making a difference in the lives of people with disabilities - how will we know a quality program if we see one and what would it take to safeguard the positive features
		Analyzing findings, lessons learned and the role of Meta evaluation in the life of program evaluators - what are the standards for the professional evaluators?
		Other topics to be negotiated

**Marking Criteria: SEMINAR PRESENTATION (Each component is worth 5% - total 25%)**

1. Uses adult teaching methods to convey material
2. Identifies/discusses underlying theory
3. Links theory to application (for example, practicum project)
4. Organizes presentation and presents clearly within required timeframe
5. Invites class discussion/feedback and responds appropriately to questions/debates

**CORE 676 FINAL EVALUATION REPORT GUIDELINES**

**Marking criteria: FINAL EVALUATION REPORT (each component is worth 10% - total 50%)**

1. Clearly written evaluation question
2. Coherent presentation of theoretical issues, service delivery model and program details
3. Relevant and current review of literature related to programmatic issues
4. Organized presentation of methodology, data collection processes, results and analysis of findings
5. Clearly written recommendations and rationale for implementation.

**COMPONENTS OF A TYPICAL EVALUATION REPORT**

I. EXECUTIVE SUMMARY

II. ACKNOWLEDGMENTS

III. INTRODUCTION AND HISTORICAL BACKGROUND

\* Include description that elaborates on stated program philosophy, goals and objectives

IV. AIMS AND OBJECTIVES OF EVALUATION

\* Also include identification of stakeholders

V. PROCEDURE AND METHOD

\* Include literature with justification of your method

\* Sub-Headings of tools you have used

\* Description of program

\* In many reports this will come after Introduction

VI. RESULTS

\* Try to follow sections under PROCEDURE AND METHOD (e.g., Specific Tests or Tools)

VII. DISCUSSION

\* Raise main issues - what works/what does not

\* Provide your justification for conclusions

\* Refer to other literature

\* Give recommendations attached to specific parts of discussion

\* Include sources of error

\* Indicate where to go from here

\* Ethical Issues/Professional Issues

VII. RECOMMENDATIONS

\* Can give in point form following sequence of discussion

\* Often better to prioritize under headings:

e.g. General Recommendations

Philosophy  
Goals  
Program Recommendations  
Record keeping

\* Individual Client Recommendations (may handle separately)

#### VIII. APPENDICES

- \* Operating Budget
- \* Introductory Letters
- \* Timetable
- \* Philosophy and Goals
- \* Job Descriptions
- \* Emergency Procedures
- \* Daily/Weekly Records (of the Center)
- \* Flow Chart
- \* Contractual agreements with agency and funding sources

#### IX. RESOURCE LISTS

List of useful material - literature, media matter with addresses or source

#### SOME ADDITIONAL CONSIDERATIONS FOR WRITING AN EVALUATION REPORT

- \* Is all or part of report confidential?
- \* Present and discuss draft of your report with person(s) requesting evaluation.
- \* What sort of statements would you be willing to change or leave out?
- \* Ethical considerations - anonymity and confidentiality.
- \* Implementation issues related to recommendations.
- \* Questions regarding follow-up.
- \* Who will get copies of the report?

## Course Timetable

### Course Description:

The course is directed towards the design, development and evaluation of community based human services for children and adults. A lecture and practicum course for the student who has a sound knowledge of disability issues, organizational and management experience and “best practices” in the field of community rehabilitation.

Each student will be required to design and implement an evaluation plan for an existing program or facility.

### FALL TERM

1. The Nature of Inquiry
  - a. How do we get at Truth
  - b. Some paradigms
  - c. Assumptions about the paradigms
  - d. Some areas of self-knowledge
2. Evaluation Context
  - a. Values and Assumptions about human services
  - b. Beliefs – world views
  - c. Skills and standards
  - d. Personal style
3. Framework for Evaluation
  - a. Definitions
  - b. Purposes
  - c. Evaluators roles
  - d. Models
  - e. Emphasis
4. Needs Assessment for Evaluation
  - a. Program areas of most interest
  - b. Outcomes
  - c. Implementation/process
  - d. Purpose of Inquiry
  - e. Needs assessment
  - f. Formative evaluation
  - g. Summative evaluation
5. The Primary Problems that Focus the Lenses of Evaluation
  - a. Lack of Knowledge in Situation
  - b. Lack of Capacity and self-determination
  - c. Lack of Inclusion
  - d. Lack of Independent perspective
  - e. Lack of Use of evaluation results
6. Major Evaluation Approaches that Offer Different Solutions
  - a. Experimental designs – elucidate causal connections
  - b. Empowerment Evaluation – process engagement
  - c. Inclusive Evaluation – target excluded, underserved populations, least advantaged
  - d. Goal – Free Evaluation – independent evaluation rendering independent judgment
  - e. Utilization –oriented evaluation – intended use by intended users
7. Evaluation Process
  - a. Different Problems, Different Solutions, Different Results
  - b. Lessons Learned From Matching Approach to Situation
  - c. Evaluation Focus

## **WINTER TERM**

1. Consultation to evaluation projects – sharing the lessons learned  
Discussion of Evaluation Reports – preparation of written and oral reports for sponsors of the projects

### **Purchasing a Textbook from the University of Calgary Bookstore:**

- Shop online: [www.calgarybookstore.ca](http://www.calgarybookstore.ca) Click on →Shop on-line; Click on →Textbooks; Follow the directions.
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Students with a disability, who require academic accommodation, need to register with the Disability Resource Centre <http://www.ucalgary.ca/drc/> MC 295, telephone 220-8237. Academic accommodation letters need to be provided to course instructors no later than fourteen (14) days after the first day of class. **It is a student's responsibility to register with the Disability Resource Centre and to request academic accommodation, if required.**

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