



#EERS24

Reality, Risk, & Resilience: Reimagining Evaluation

46th Annual Conference of the Eastern
Evaluation Research Society

 April 18 & 19, 2024

 Online



Welcome



Hello and thank you for attending the 2024 EERS annual conference, our 46th annual event!

I am excited to welcome two fantastic plenary speakers to this year's conference: Felicia Bohanon, President of the American Evaluation Association, and Amy Liu from The Brookings Institution.

Over two days, we will explore how the evaluation and research professions continue to evolve. We will hear seasoned professionals share their perspectives rooted in decades of experience and we will hear from our student award winners. This year's student award winners are: Marshall Young from University of Tennessee, Emmanuel Anobir Mensah from University of Mississippi, and Jake Working from the University of Tennessee Knoxville.

I would also like to thank our conference sponsor, Equal Measure, for their support.

We have many fantastic sessions this year. I hope you take the time to attend as many as possible. I hope that all of our speakers inspire you to continue your important work.

Thank you once again for attending #EERS24.

Isaac D. Castillo
EERS President

EERS24 Sponsors

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Meet Our Plenary Speakers



Felicia R. Bohanon
American Evaluation Association
Thursday, April 18

Felicia R. Bohanon is the President of the American Evaluation Association. An experienced administrator and evaluator, Dr. Bohanon currently serves as Executive Director of the Office of Precollegiate Programs at Northern Illinois University (NIU). Since 1980 she has devoted her career to assisting economically disadvantaged and minority middle and high school students in their preparation for post secondary matriculation. She also has experience as a researcher, community college instructor and policy analyst. She is the Executive Director of Bohanon Education, Evaluation & Grant Writing Services, which provides consulting services that include: program design and implementation, fundraising, program evaluation, and grant writing to educational institutions, social services agencies and faith-based organizations.

Felicia holds a B.A. degree in Sociology with a concentration in Individual and Family Development from the University of Notre Dame, a M.S. degree in Elementary Education from Indiana University and a doctorate in Community College Leadership from Ferris State University. Felicia is also a certified Spiritual Life Coach.

Meet Our Plenary Speakers



Amy Liu,
The Brookings Institution
Friday, April 19

Amy Liu is a presidential advisor and senior fellow at The Brookings Institution. She advises executive leadership and oversees institution-wide initiatives that bring together leading experts and collaborative approaches to addressing key domestic and international challenges.

Liu is an expert on cities and metropolitan areas and the interplay of national, state, and local policies in expanding economic opportunity. She has worked with leaders across the U.S. to translate research insights into action and written extensively about the future of post-pandemic cities, inclusive economic growth, state and local cooperation, and the role of federal policies in supporting place-based revitalization across urban and rural areas. Liu's paper *Remaking Economic Development* spurred the development of new metrics for defining quality economic performance for metro areas and inspired widespread shifts in the goals and practices of many economic developers.

Liu holds a Bachelor of Science degree in social policy with a concentration in urban studies from Northwestern University. In 2015, Liu completed the High Impact Leadership Program at Columbia Business School. She lives in Alexandria, VA with her husband and two daughters.



Schedule | Thursday, April 18

9:30am	Welcome & Opening Plenary from Felicia Bohanon			
11:00am	Break			
11:15am	Continued Conversations & Networking			
12:00pm	Lunch			
1:00pm, Concurrent Session 1	<i>A New Lens on Financial Hardship: ALICE Data in Your Community (W)</i>	<i>Advancing Racial Equity in Evaluation: Lessons from Philadelphia (P)</i>	<i>Navigating Uncertainty: Collaborative Decision-Making as a Tool for Action (S)</i>	<i>The 4 P's - People, Purpose, Process and Practice - a Holistic Approach to Equitable Evaluation (W)</i>
2:00pm	Break			
2:15pm, Concurrent Session 2	<i>Reimagining the Evaluation of Complex and Multifaceted Initiatives: Creating and Testing a Cross-HHS Evaluative Framework (I)</i>	<i>Leveraging a Marketing Research Framework to Create Better Data Products (I)</i>	<i>Examining the Reliability and Validity of City Connects' Revised Fidelity Monitoring System (I)</i>	<i>Relational Systems Evaluation Rubrics as Tools for Building and Measuring Evaluation Capacity (I)</i>
2:35pm	Break			
2:45pm, Concurrent Session 3	<i>Lessons from the Wu-Tang Clan: Strategies to Align Diverse Skill Sets and Project Portfolios to Elevate Evaluation and Research Success (S)</i>	<i>Reimagining Evaluation Compensation Centering Equity (S)</i>	<i>Reimagining Large-Scale Program Evaluation Studies in Response to COVID-19 (P)</i>	<i>Leveraging Stakeholder and Evaluator Knowledge for Improved and Evolving Contract Monitoring and Better Evaluations (P)</i>
3:45pm	Closing & Thank you			

(I) Individual Presentation, (P) Panel Presentation, (S) Skill-building Presentation, (W) Wildcard Presentation

Schedule | Friday, April 19



9:30am	Welcome & Opening Plenary from Amy Liu			
10:30am	Break			
10:40am	Continued Conversations & Networking			
11:25am	Break			
11:35am, Concurrent Sessions 4	<i>The Call for Culture Method™ - A Fresh Take on Workplace Culture Evaluation (W)</i>	<i>How do you check your partnership's vital signs? Rethinking Partnership Evaluation to Serve Collaboration and Data Collection (I)</i>	<i>Virtual Orientation Advising: Is It Working? (I)</i>	<i>Is Dataviz Too Risky? How to Improve Graphs without Rocking the Boat (I)</i>
12:05pm	Lunch			
1:00pm, Concurrent Sessions 5	<i>After Action Reviews (AARs) as a Tool for Collaborative Learning and Adaptation (CLA) in Theory-Driven Evaluation (S)</i>	<i>Philadelphia STEM Equity Collective - Understanding Process to Support An Outcome Evaluation (P)</i>	<i>Utilizing Developmental Evaluation with Transdisciplinary Teams to Build Strong Connections and Equitable Solutions (S)</i>	<i>A Gathering Place for Minorities in Quantitative Sciences: A Panel Discussion on the Vital Role of the InclusiMetrics Conference (W)</i>
2:00pm	Break			
2:15pm, Concurrent Sessions 6	<i>Crafting Evaluation Reports That Make a Splash (I)</i>	<i>Defining and Assessing Emerging Evaluators: Reimagining the Practice of Evaluation (I)</i>	<i>Defining and Assessing Emerging Evaluators: Reimagining the Practice of Evaluation (I)</i>	<i>Re-Rooting Ourselves in Collaborative Evaluation through Buber's Philosophy of Dialogue (W)</i>
2:35pm	Break			
2:45pm, Concurrent Sessions 7	<i>Defining and Assessing Emerging Evaluators: Reimagining the Practice of Evaluation (I)</i>	<i>Client Voices in Evaluation: Translating Findings to Action with Clients at the Center (I)</i>	<i>Meeting Practitioners Where They Are in a Time of Change (I)</i>	
3:00pm	Break			
3:15pm	Closing & Thank you			
3:25pm	Break			
3:35pm	EERS Board Meeting			

(I) Individual Presentation, (P) Panel Presentation, (S) Skill-building Presentation, (W) Wildcard Presentation



Concurrent Sessions 1 | 4/18, 1 PM

A New Lens on Financial Hardship: ALICE Data in Your Community (W)

Scott Mengebier, Director of Research and Evaluation, *United Way of the National Capital Area*

ALICE (Asset Limited, Income Constrained, Employed) populations are essential workforce and families earning above Federal Poverty Level but less than costs of living in your community. Join United Way NCA to explore the data and learn how its alleviating financial hardship in the Washington DC MSA.

Advancing Racial Equity in Evaluation: Lessons from Philadelphia (P)

Eve Weiss, Senior Director, Matthew Closter, Director, Katie Mosher, Senior Consultant, Cynthia Roman-Cabrera, Senior Consultant, & Giselle Saleet, Consultant, *Equal Measure*

Equal Measure presents equity-focused evaluation practices in designing a year-long collaboration with community-based organizations, evaluation partners, program participants, and the City of Philadelphia to understand and communicate the value of place-based programs in reducing gun violence.

Navigating Uncertainty: Collaborative Decision-Making as a Tool for Action (S)

Dr. Leah Ferguson, Director of Evaluation, & Lenka Berkowitz, Evaluation Manager, *Alliance for a Healthier Generation*

The session presents a new approach for evaluators to support community resiliency. It focuses on collaborative decision-making, a crucial tool to support networks in adapting to complex challenges that go beyond the ability of any single organization.

The 4 P's - People, Purpose, Process and Practice - a Holistic Approach to Equitable Evaluation (W)

Candace Kenyatta, Founder & CEO, *GroviderLE*; Claire Robertson-Kraft, ED, *ImpactED*; Wendy McClanahan, Founder & President, *MAI*; Meridith Polin, Senior Program Officer, *The Pew Charitable Trusts*; Daria Waite, Research Associate, *Healing Hurt People at Drexel University*, & George Reuter, Director of Impact & Innovation, *Compass Working Capital*

Equitable evaluation is the way forward for our field. This session will introduce participants to new ways of thinking about and implementing equitable evaluation in nonprofit contexts including practices for establishing meaningful community partnerships.



Concurrent Sessions 2 | 4/18, 2:15 PM

Reimagining the Evaluation of Complex and Multifaceted Initiatives: Creating and Testing a Cross-HHS Evaluative Framework (I)

Kristen Hudgins, Social Science Analyst, & Susan Jenkins, Director, *Division of Evidence, Evaluation, and Data Policy, ASPE, HHS*

HHS conducts a broad array of activities across many programs, populations, and services. To understand how these activities enhance health and well-being of people and communities HHS developed and tested a systematic approach for identifying and evaluating its complex, multifaceted initiatives.

Leveraging a Marketing Research Framework to Create Better Data Products (I)

Joanna Prout, Research Manager, Department of Psychiatry, *University of Maryland School of Medicine*

Are you frustrated that people don't use the data you worked to collect and analyze? This presentation explains how to overcome this struggle by using the Jobs To Be Done (JTBD) framework to create data products for busy people.

Examining the Reliability and Validity of City Connects' Revised Fidelity Monitoring System (I)

Gianna Pedro, *City Connects at Mary E. Walsh Center for Thriving Children at Boston College*

This study examines the reliability and validity of the City Connects interventions' unique fidelity monitoring system. It exhibits the robustness of this system as an evaluation tool and indicates potential improvements for City Connects researchers and practitioners.

Relational Systems Evaluation Rubrics as Tools for Building and Measuring Evaluation Capacity (I)

Rebecca Davis, Jennifer Brown Urban, Elyse Postlewaite, & Elaine Les, *Montclair State University*; Monica Hargraves, *Hargraves Consulting*; Jane Buckley, *JCB Consulting*

Evaluation capacity building has gained increased attention but there are few measures to assess ECB training. Existing measures use self-report. This presentation describes rubrics for assessing logic model, pathway model, and evaluation plan quality using a Relational Systems Evaluation framework.



Concurrent Sessions 3 | 4/18, 2:45 PM

Lessons from the Wu-Tang Clan: Strategies to Align Diverse Skill Sets and Project Portfolios to Elevate Evaluation and Research Success (S)

Megan Diaz, BA, Associate Director, Melanie Gonzalez, BA, HR & People Manager, & Jack Vertovec, PhD, Senior Evaluation Associate, *Behavioral Science Research Institute (BSRI)*

This session draws from a recent article about the Wu-Tang Clan – which showcases how the hip-hop group has mastered brand management – as inspiration to describe strategies for managing a diverse group of evaluators and growing a resilient brand through intentional work on individual interests.

Reimagining Evaluation Compensation Centering Equity (S)

Komani Cedano, CEO & Co-owner, *Via Evaluation*, & Corey Newhouse, Founder & Principal, *Public Profit, LLC*

Many evaluation and consulting practices unknowingly adopt compensation strategies that conflict with their commitment to equity. This workshop introduces more equitable, values-aligned alternatives. Participants will gain practical strategies for implementing fairer compensation methods.

Reimagining Large-Scale Program Evaluation Studies in Response to COVID-19 (P)

Linlin Li, Research Director, Mingyu Feng, Research Director, & Natalie Brezack, Research Associate, *WestEd*

We will present the adjustments we made across three large-scale program evaluation studies that took place during the COVID19 pandemic. The adjustments were made conscientiously to respond to pandemic-related participant needs and to maintain high-quality evaluation standards.

Leveraging Stakeholder and Evaluator Knowledge for Improved and Evolving Contract Monitoring and Better Evaluations (W)

Rebecca Rosenblatt, *National Science Foundation (NSF)/STEM Education Directorate (EDU)/Division of Equity for Excellence in STEM (EES)*, Michael M. Rook, *NSF/EDU/Office of Assistant Director*, Frances Carter-Johnson, *NSF/EDU/EES*, Peter York, *BCT Partners*, & Karina Vega-Villa, AAAS-STP Fellow at *NSF/EDU/EES*

Evaluation experts from NSF and BCT Partners will provide an engaging session on how to encourage risk and reimagine the evaluation relationship between the evaluation requestor and external evaluator. We will share challenges encountered and best-



Concurrent Sessions 4 | 4/19, 11:35 AM

The Call for Culture Method™- A Fresh Take on Workplace Culture Evaluation (W)

Jennifer Tolisano, Senior Associate of Research and Evaluation & Dara Murray, Principal and Founder, *Black Walnut Consulting*; Angela R. Howard, CEO, *Call for Culture*

Call for Culture offers a fresh take on workplace culture evaluation through The Call for Culture Method™. This presentation will demonstrate how it is implemented to transform organizations into human-centered workplaces that create social impact through evaluation and data driven decisions.

How do you check your partnership's vital signs? Rethinking Partnership Evaluation to Serve Collaboration and Data Collection (I)

Jaime Kishpaugh, Research Coordinator, & Sarah String, Project Manager, *Research & Evaluation Group, Public Health Management Corporation (PHMC)*; Sara E. Thuma, Public Health Program Administrator, *PA Department of Health*

Given shifts in the external environment, many organizations are wrestling with what it looks like to apply the concept of equitable evaluation. This session will explore the values, processes, and practices that are necessary to challenge the status quo and reimagine the field of evaluation.

Virtual Orientation Advising: Is It Working? (I)

Jake Working, PhD Student, *University of Tennessee, Knoxville*

The University of Tennessee, Knoxville is conducting an ongoing evaluation to understand the impact of virtual orientation advising for incoming engineering students. This presentation discusses the process and early findings of the evaluation that will be used to improve academic advising.

Is Dataviz Too Risky? How to Improve Graphs without Rocking the Boat (I)

Ann K. Emery, Data Visualization Designer, *Depict Data Studio*

Are you hesitant to use dataviz? Change is hard, and takes time. Especially in traditional settings and large orgs. You'll learn about 5 low-risk and 5 high-risk dataviz approaches. After all, we want to communicate data... without turning anyone off by changing everything all at once.



Concurrent Sessions 5 | 4/19, 1:00 PM

After Action Reviews (AARs) as a Tool for Collaborative Learning and Adaptation (CLA) in Theory-Driven Evaluation (S)

Romita Mitra, *Massachusetts Institute of Technology*, Laura Roldan, *Universidad del Valle de Guatemala*, & Shubha Srishti, PhD Student, *Tata Institute of Social Sciences, India*

The session will introduce the concept of After Action Reviews (AARs) within the context of evaluation work and the team share examples of AARs being incorporated into Collaborative Learning and Adaptation (CLA) practices in the context of theory-driven evaluation.

Philadelphia STEM Equity Collective - Understanding Process to Support An Outcome Evaluation (P)

Lexie Walsh, MSW, Assistant Director of Research & Evaluation, *ImpactED at UPenn*, & Nancy Peter, Ed.D, Director, *McKinney Center for STEM Education, Philadelphia Education Fund*

This presentation explores how and why the Philadelphia STEM Equity Collective (PSEC) changed from examining its outcomes to reflecting on its process. This change enabled PSEC to better understand the extent to which it was implementing a collective impact model and infusing equitable practices.

Utilizing Developmental Evaluation with Transdisciplinary Teams to Build Strong Connections and Equitable Solutions (S)

Tobi Cawthra, MPH, Program Director, *MCW*, & Laura Pinsoneault, PhD, President, *Evaluation Plus*

Developmental Evaluation (DE) generates insights in real time to build more resilient, authentic, connections across disciplines. We have paired DE with a transdisciplinary approach to influence how academics and non-academics work together to create equitable solutions for cancer disparities.

A Gathering Place for Minorities in Quantitative Sciences: A Panel Discussion on the Vital Role of the InclusiMetrics Conference (W)

Marcus Harris, Graduate Student, & Zachary Collier, Assistant Professor, *University of Connecticut*

Explore aspects of diversity and inclusion within the realm of evaluation and quantitative sciences. Our panel discusses the pivotal role of InclusiMetrics, addressing the involvement of non-minorities, promoting field understanding, and exploring advocacy strategies for broader engagement.



Concurrent Sessions 6 | 4/19, 2:15 PM

Crafting Evaluation Reports That Make a Splash (I)

Emily Frost, Evaluation Manager, *March of Dimes*

Have you ever circulated an evaluation report to stakeholders and ... [insert crickets chirping here]? Move from text-heavy and academic-language-laden documents to vivid, impactful, and accessible reports. Join us to discuss storytelling practices, audience tailoring strategies, and real case studies

Defining and Assessing Emerging Evaluators: Reimagining the Practice of Evaluation (I)

Marshall Young, PhD Student, Richard Amoako, PhD Student, & Jake Working, PhD Student, Evaluation, Statistics, and Methodology, *University of Tennessee*

Evaluators love to evaluate, but do they love being evaluated as much? What is an equitable way to assess evaluators? This presentation seeks to examine who is “emerging” and who is “established”, and from there, open the conversation about developing a rubric to measure competency in the field.

Measuring Resilience: Evaluating Programs that Involve Participants Experiencing Disaster and Trauma (I)

Michael Vanic, Senior Research Analyst, Andrew MacDonald, Senior Manager, & Susana Mazuelas Quirce, Ph.D, Lead Research Analyst, *ICF*

We offer tips for evaluating programs that involve participants who have experienced recent acute trauma such as a natural disaster. Our presentation includes how to adapt data collection, interview techniques, and report writing to represent participants’ situations accurately and respectfully.

Re-Rooting Ourselves in Collaborative Evaluation through Buber’s Philosophy of Dialogue (W)

Tiffany Tovey, PhD, Director of the Office of Assessment, Evaluation, and Research Services, & Stacy Huff, Graduate Student, *UNC Greensboro*

This session surfaces the importance of a philosophical orientation toward dialogue in evaluation through engaging participants in exploration of Buber’s philosophy of the nature of relationships, how it relates to their approach to evaluation, and challenges and opportunities.



Concurrent Session 6 | 4/19, 2:45 PM

Application of Causal Loop Diagrams and Bayesian Belief Networks in Program Evaluation: Using a Case Study (I)

Emmanuel Anobir Mensah, Graduate Student, & Nesma Osman, Assistant Professor, School of Human Sciences, *Mississippi State University*

The paper proposes applying causal loop diagrams through a mixed methodology approach that integrates systematic quantitative literature review and focus group discussion, together with Bayesian Belief Networks, for more rigorous evaluation results produced by the systems thinking approach.

Client Voices in Evaluation: Translating Findings to Action with Clients at the Center (I)

Juan Sandoval, Senior Evaluation Coordinator, & Elena Pinzon O'Quinn, Senior Director of Learning and Evaluation, *LIFT*


We present a framework that centers the voices of program beneficiaries in evaluation with an eye toward evaluation use and equity and discuss how it has helped us reimagine our evaluation practice.

Meeting Practitioners Where They Are in a Time of Change (I)

Gabriel Rhoads, Managing Director, & Matt Hillard, Director, Nonprofit and Philanthropy Practice, *Project Evident*

Strategic Evidence Plans (SEPs) help nonprofits identify evidence-building goals and develop a detailed roadmap to achieve them. Our presentation will focus on how SEPs analyze an organization's context and capacity to help them improve their ability to build and use data and evidence.

Frequently Asked Questions



Do presenters need to register for the conference?

Yes, all presenters need to register and pay for the conference. Only keynote speakers, invited speakers, and sponsors receive complimentary registration for the event.

Is there a student registration discount?

Yes, students can register for the conference at a discounted rate of \$60.

How can attendees access the virtual conference?

Registered attendees will be emailed a notification directly from Zoom with the conference access information. Attendees will have the opportunity to add personal information to their profile such as a photo, bio, and social media links, as well as network with other attendees and presenters. You may want to check your spam folder for these notices.

In what format will the sessions be held?

Most of the sessions will be held using the Zoom meeting format, allowing attendees to ask questions and interact with presenters. Please be patient as we upload the recordings to the platform after the sessions.

Do I need access to Zoom?

Yes, the conference is being held on Zoom Events, so you need an account to register and attend the conference.

Will sessions be recorded?

We know that it can be difficult to choose what presentations to attend. Sessions will be presented live at Eastern Standard Time during the event. If presenters have consented to having their presentation recorded, recordings will be made available in Zoom Events for registered attendees for 90 days following the conference.

I registered for the event but did not get a receipt or notification about the conference platform.

If you are having difficulties with registration or are unsure about whether you have the most up to date information, please email President@eers.org and we will be happy to check on the details of your registration for you.



If I am a presenter, can I practice using the platform in advance?

Each session's moderator will reach out to presenters in advance to discuss conference logistics and arrange a practice session, if desired. On the day of your presentation, please log into the Zoom Events platform approximately 15 minutes before your presentation to load your slides and discuss any last-minute preparations with your session moderator.

If I am a presenter, will I have access to breakout rooms?

Yes, each presentation can have access to breakout rooms. Please discuss this and other technology or presentation needs when you connect with your session moderator.

Will there be opportunities to network with other attendees?

Yes! A core part of the EERS conferences is meeting other attendees. We have built multiple spaces into the event to engage with others (coffee chats and continued conversations). You can also message other attendees within the app to set up informal chats and conversations. We hope you do!

Will attendees be able to download presentations?

We understand that every presenter has their own policy about their intellectual property and materials. If presenters have handouts or materials that are available to be distributed, those will be made available for download directly from the session in the Zoom Events platform.

What should I do if I experience any challenges during the event?

EERS board members will be available to help problem solve. All board members will be listed in the Zoom Events platform and will be available to chat if you need help.