

MODERATOR:

Welcome to today's Coffee Break presented by the Applied Research and Evaluation Branch in the Division for Heart Disease and Stroke Prevention at the Centers for Disease Control and Prevention.

We are fortunate to have Rashon Lane Filali as today's presenter, she is a Behavioral Scientist on **the Evaluation and Program Effectiveness Team**.

My name is Sharada and I am today's moderator. I am in the Applied Research and Evaluation Branch.

Before we begin...

All phones have been placed in SILENT mode.

Issues or questions:

- Q & A box on your screen**
- AREBheartinfo@cdc.gov**



MODERATOR:

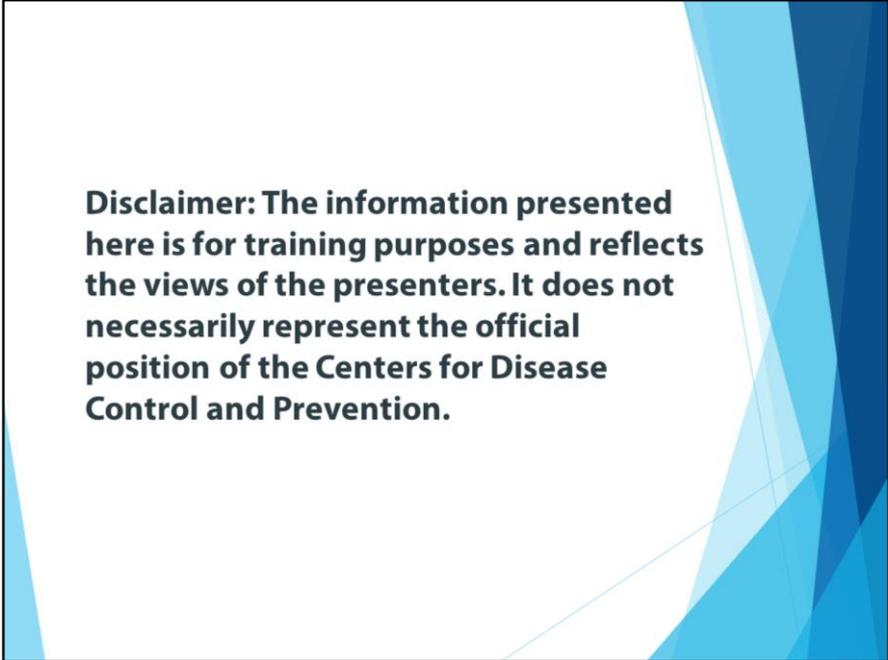
Before we begin we have a few housekeeping items.

All participants have been muted. However, to improve audio quality please mute your phones and microphones.

If you are having issues with audio or seeing the presentation, please message us using the chat box or send us an email at AREBheartinfo@cdc.gov

If you have questions during the presentation, please enter it on the chat box on your screen. We will address your questions at the end of the session.

Since this is a training series on applied research and evaluation, we do hope you will complete the poll and provide us with your feedback.

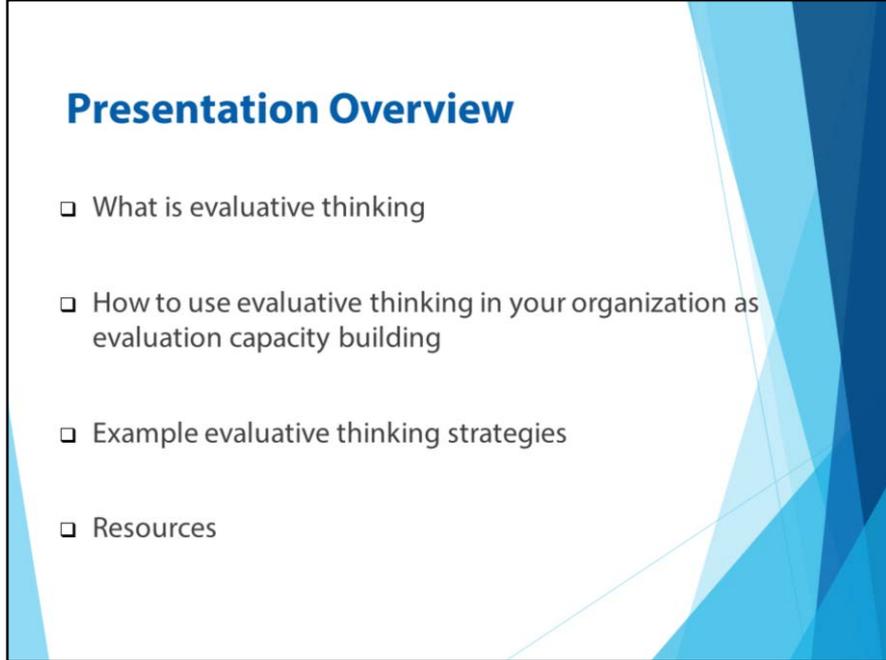


Disclaimer: The information presented here is for training purposes and reflects the views of the presenters. It does not necessarily represent the official position of the Centers for Disease Control and Prevention.

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So, without further delay. Let's get started. Rashon the floor is yours.



Thank you Sharada, In this Coffee Break presentation I will:

- Discuss what is evaluative thinking and how it can be incorporated into evaluation practice,
- Share how evaluative thinking can be incorporated into a framing of building evaluation capacity within your organization and lastly;
- Share some learning exercises that can be used to facilitate evaluative thinking throughout the evaluation process

Please note that this Coffee Break will provide a conceptual overview of evaluative thinking as a tool for in building evaluation capacity in your organization. However, it is not intended to be a comprehensive presentation, as there are many ways to engage in evaluation capacity building.

Evaluative Thinking: Definition

Evaluative thinking is critical thinking applied in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking, and informing decisions in preparation for action. (Buckley, J. et al., 2015)

Buckley, J., Archibald, T., Hargraves, M., and Trochim, W.M. (2015) Defining and Teaching Evaluative Thinking: Insights From Research on Critical Thinking. American Journal of Evaluation 36, 3. 375 – 388.

Perhaps, you are thinking how can I change my organization's understanding so that they embrace **the idea** that evaluation is a useful activity in assessing the process and outcomes of our work. Then, evaluative thinking might be a tool that you include in your work.

- Evaluative thinking (ET) is an important topic in the field of evaluation, particularly among people involved in evaluation capacity building (ECB).
- Evaluative thinking is defined as critical thinking applied in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking, and informing decisions in preparation for action. (Buckley, J. et al., 2015)
- In definitions of evaluative thinking it's also described similar to a reflective practice or as a way to questioning, reflecting, learning, and modifying. It can be seen as ~~is~~ a constant state-of-mind within an organization's culture and all its systems''. It has also been described as a way to get people in organizations to look at themselves more critically through systematic inquiry.

Evaluative Thinking

*Evaluation is an activity.
Evaluative thinking is a way of doing business*
–Michael Quinn Patton

➤ Evaluative thinking should be used in your **INDIVIDUAL** evaluation practice

AND

➤ Evaluative thinking should be used to build **ORGANIZATIONAL** evaluation capacity

Today's presentation will be focused on evaluative thinking at an organizational level.

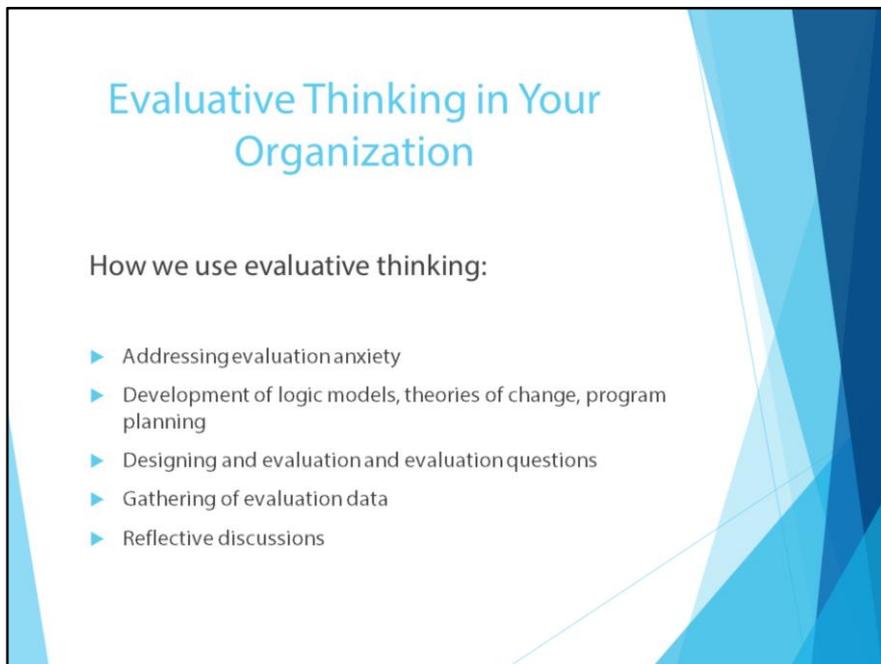
Now that you know what evaluative thinking is, you might be thinking how is it different from the regular evaluation work I do.

Think about it this way, Michael Quinn Patton states, evaluation is an activity, evaluative thinking is a way of doing business.

Another way to put it is, evaluative thinking as critical thinking applied to evaluation. Meaning that evaluative thinking allows the those designing and implementing evaluation practice to ask questions such as:

- How did this come about?
- Why do we assume that this is the best way to implement evaluation?
- Or perhaps what might other be stakeholders thinking about these evaluation findings?

Essentially, evaluative thinking is a great way to constantly think about alternative understandings and explanations to what you hold as truths of evaluation.



If you are wondering where to start in your evaluative thinking journey, make a list of some of the key concerns that you might encounter when engaging with evaluation in your organization. What are the things that regularly come up when you start to plan or execute your evaluation? And how can you ask evaluative questions that will help in getting to the root of the issue. Lets take the first bullet list on this slide, which is evaluation anxiety.

Instead of taking an approach that no one likes program evaluation in your organization, or I can't get my stakeholders to buy into evaluation. An evaluative thinker would ask,

- what are some of the reasons why my organization may not be willing to engage in evaluation?
- What is the history behind my engaging in evaluation at my organization?
- And what might we uncover if we begin this evaluation journey?

Start with these questions and later in this presentation. I will walk you through a learning exercise that you can use for evaluation anxiety in your organization.

Did you come up with some questions in your head on who your organization might get

anxious at the thought of evaluation? Quickly write those questions down, that's exactly what evaluative thinking is about.

Some other ways that you can use evaluative thinking is during the program design and evaluation development of your intervention strategies. Evaluative thinking can also be incorporated in the way you understand and interpret evaluation data and with facilitating reflective discussions.

Ask these type of questions

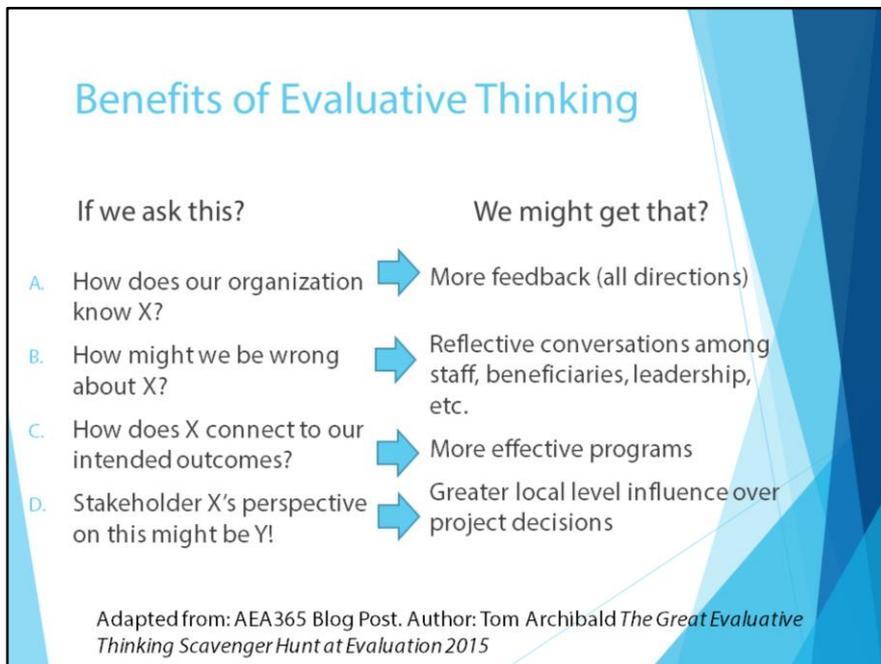
When engaging in your evaluation practice...

- ▶ What evidence do we have to justify this opinion?
- ▶ How credible is that evidence?
- ▶ Who defines what evidence is credible?
- ▶ What are some alternative explanations?
- ▶ Does the explanation differ by the stakeholder viewpoint?
- ▶ What do you think our evaluation stakeholders would say?
- ▶ What assumptions are we operating under?

When engaging in evaluative thinking these are the types of questions that you might consider asking to staff and organizational leaders.

- Some questions include:
 - What do you think our evaluation stakeholders would say?
 - What assumptions are we operating under?
 - What evidence do we have to justify this opinion?
 - How credible is that evidence?

And other questions are listed here on this slide.



Another way of encouraging use of evaluative thinking within your organization is to think of the overall impact or benefits from conducting evaluation.

There are many benefits of evaluative thinking including increased feedback within the organization across all levels and positions. Also this could provide an opportunity to have more reflective conversations about where issues lie or where you are doing really well.

Evaluative thinking can also be highly effective in connecting your program theory and strategies to your outcomes. You might use critical questions about “how” your theory of change came about in order to develop more effective programs.

Creating Opportunities for Evaluative Thinking

Existing structures and places to incorporate evaluative thinking

- ▶ Staff meetings
- ▶ Advisory committee/advisory group meetings
- ▶ Working group meetings
- ▶ Communities of practice
- ▶ Task force meetings
- ▶ Evaluation presentations
- ▶ Company/organization-wide meetings
- ▶ Annual staff or team retreats
- ▶ Board or professional meetings
- ▶ Brown bag lunches
- ▶ Grantee and partner meetings
- ▶ Steering committee meetings
- ▶ Expert talks
- ▶ Site visits
- ▶ Community forums and town halls

Evaluative thinking doesn't have to occur in isolation from the existing work that you do in public health. In fact, evaluative thinking works best when it is a part of your every day work life and how you engage in evaluation practice. Some of the existing opportunities and structures that you may consider.

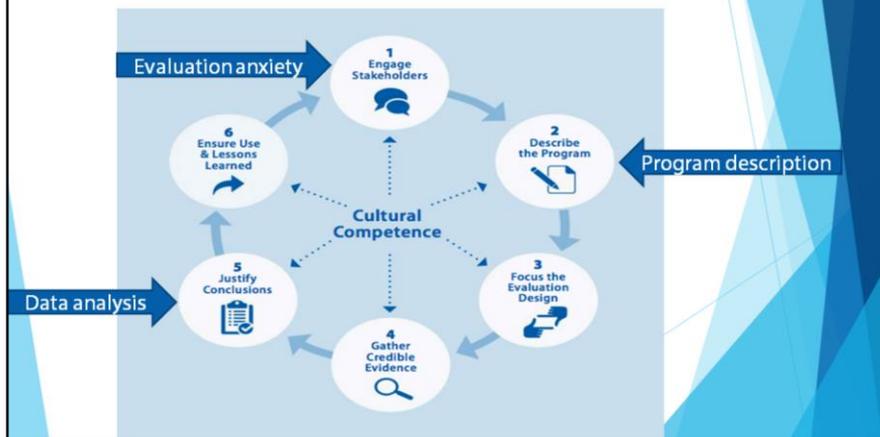
Evaluative thinking is an opportunity to challenge the way you think about evaluation and the ways in which evaluation practice operates within your organization. If we start from the beginning of the CDC evaluation framework, with the first step on engaging stakeholders. Start by examining who is around the table and ask,

- are these all the relevant stakeholders?
- what groups or individuals does my organization not have at the table?
- and why don't engage these individuals?

For example, if you're conducting an evaluation that addresses disparities or a marginalized population group, are these individuals a part of your stakeholder group? If the answer is NO, then continue to challenge your organization on how you might better engage and listen to the voices that should be included in order to appropriately address health disparities.

Let's take a look at some of the opportunities on this slide to that you might choose when incorporating evaluative thinking, such as staff meetings, communities or practices or site visits.

Evaluative Thinking in Action: Evaluation Capacity Building



I would now like to think about evaluative thinking in action. Specifically, I would like to discuss evaluation capacity building as an overall framework that evaluative thinking is a part of.

- Evaluation capacity building involves the design and implementation of teaching and learning strategies to help individuals, groups, and organizations, learn about what constitutes effective, useful, and professional evaluation practice. The ultimate goal of evaluation capacity building is to conduct effective evaluations. evaluation capacity building should lead to sustainable evaluation practice—where members continuously ask questions that matter, collect, analyze, and interpret data, and use evaluation findings for decision-making and action. Moreover, evaluation capacity building should include continuous learning opportunities that create and sustain overall organizational processes that make quality evaluation and its uses routine.

Next, I will discuss four learning activities as it relates to the steps in the CDC evaluation framework. I will share four examples from three of the CDC evaluation steps you might utilize in your evaluation practice as a way to put evaluative thinking into action. These examples were pulled from the FSG- Facilitating Intentional Group Learning Guide. The first activity addresses evaluation anxiety, the second activity focuses on developing

program descriptions and the last two examples addresses data analysis.

responses with a line and/or question mark. Once everyone has had a chance to write and respond as they wish, the facilitator may ask participants to share what they see on the flipchart pages.

In this example– you might write a common concerns or questions that has come up previously on the flip chart. Or similarly to the picture on this slide, you might just write the word Evaluation– to try to understand what the word brings up for individuals. During the debrief– use some of the evaluative think questions that we posed earlier in the presentation to engage the group.

Some examples are: What might others perspectives be? Or how do we know this for our organization?

Evaluative Thinking in Action Example 2: Describe the Program

- ▶ Activity: Mental Models Drawing
- ▶ Purpose: To get a quick read on how individuals are viewing program or intervention strategies
- ▶ Time needed: 20 minutes or less
- ▶ Participants 5-10 people



Source: FSG- Facilitating Intentional Group Learning
[see resources slide for full citation]

Let's talk about an activity you can do to describe the program or intervention that you plan to evaluate.

In the learning activity called Mental Models the goal is to get a quick read on how participants are viewing an issue, problem, or opportunity, provide them with an 8"x11" piece of paper and fine point markers. Ask them to take 3 to 5 minutes to draw a picture of how they "see" the chosen topic. They can share these drawings in pairs, in small groups, or as a large group. The size of the group depends on the time available and the extent to which participants are familiar with each other. A brief 10- to 15-minute large group discussion can focus on similarities, differences, and implications among the drawings (participants' perceptions). Mental Models can also be demonstrated by using Play-Doh, Legos, picture collages, poems, or other manipulatives that can serve as metaphors for one's thinking.

Once you have all of the mental models available. You might place them together or ask for individuals' to reflect on what their model represents.

Evaluative Thinking in Action Example 3: Data Analysis

- ▶ Activity: Data Placemats
- ▶ Purpose: A data interpretation session in which the evaluator presents the data placemats and guides stakeholders through a process of **interpreting** and **drawing meaning** from data
- ▶ Time needed: At least 60 minutes
- ▶ Participants 2-50 people



Source: FSG- Facilitating Intentional Group Learning
[see resources slide for full citation]

Now I'd like to focus our attention to a data analysis exercise— In the CDC framework this could assist in the step on justifying conclusions. This activity, called data placemats provides an opportunity to reflect on a set of data that is presented in a visually interesting and simple way, to co-interpret data, and to determine implications for decision making and action.

This activity works best with groups of 2 to 50 and with participants who can be physically present, but it can be adapted with people who are on a phone or video conference. It is particularly meaningful for participants who are involved in the program or initiative for which the data were collected.

So here is how it works. This can be done with both quantitative or qualitative data. Prior to the meeting, prepare a piece of paper with analyzed data such as charts, tables, quotes, or other information. The paper can be set at each participant's seat as a "placemat" for discussion. The data may be individual findings, or they may represent themes and patterns. The data included on the placemats should reflect an interest in further interpretation and meaning-making by the participants. These might be findings that are surprising, have multiple interpretations, require a greater understanding of context, or have significant importance for the organization.

At the beginning of the meeting, the facilitator sets the stage by providing any necessary context for the data (e.g., evaluation's purpose, how the data were collected, how data were selected for inclusion on the placemat) and explains that the purpose of the activity is to develop a mutual understanding of the data, their meaning, and implications. The group engages in a discussion about one placemat at a time. If a group has multiple placemats to discuss, the facilitator clearly identifies which placemat is being discussed and when.

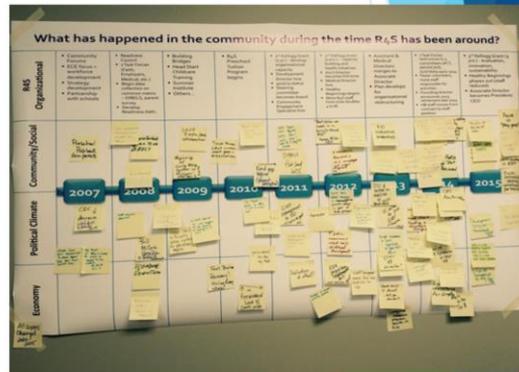
The facilitator may ask the following questions to facilitate evaluative thinking:

- What do these data tell you?
- What is or whose voices are missing from the data?
- What factors may explain some of the trends we are seeing?

The outcome of this meeting might be a need to further analyze the data and/or to integrate the interpretations into a set of next steps or action items.

Evaluative Thinking in Action Example 2: Justifying Conclusions– A focus on contextual factors

- ▶ Activity: Timeline mapping
- ▶ Purpose: The process of arranging important investments, events, actions, activities, achievements, and other milestone markers in chronological order so that they can be seen in temporal relationship to one another and to key contextual factors (e.g., social, economic, political, demographic, and cultural events and trends).
- ▶ Time needed: At least 60 minutes
- ▶ Participants 5-10 people



Source: FSG.org- Facilitating Intentional Group Learning
[see resources slide for full citation and link to Timeline mapping tool]

The last exercise that I will share today is also related to justifying conclusions, but this example is focused on the context of a program. A focus on context is needed in order to accurately understand and reveal the meaning behind evaluation findings.

In a logic model, you might see a box at the bottom or the side that states “contextual factors” but often times there isn’t much thought into what are these contextual factors and how do they really impact my program. In this exercise called Timeline mapping, I want to invite you to think critically about the factors that might impact your program. These can be social, economic, political, or geographic changes that truly impact the way your program operates.

Timeline mapping is the process of arranging important investments, events, actions, activities, achievements, and other milestone markers in chronological order so that they can be seen in temporal relationship to one another and to key contextual factors (e.g., social, economic, political, demographic, and cultural events and trends). A timeline map arranges important events, activities, grants, actions, achievements, and other milestone markers in chronological order, enabling insight into how they relate to and influence one another. Timeline mapping can help uncover an initiative or program’s context and history, identify how external factors influence it, and put a

group's progress and challenges into broader context.

Before you plan to facilitate a timeline mapping exercise, you will need to do some prep work. First set the boundaries of the timeframe of your intervention. You might consider the adding a few years prior to beginning your program as well. Now pre-populate a grid like the photo similar to what is presented on this slide which includes headers for economy, political climate, community/social factors, and organization factors. You can use existing data from previous grant reports, evaluation reports, or interviews to add in information to the timeline.

Next, select two to three questions that you want to be sure to ask directly to the group. At that time you will ask participants to add key data points that align with the contextual factors heading and the appropriate year.

During the discussion, draw the group's attention to themes and insights they share, past examples of how the organization or initiative has emerged or adapted, and ways the group responded to or missed external shifts in the system. Invite the group to share stories that illustrate best practices or learning moments. Record the group's comments and insights in the "observations" row of the timeline template.

For example, if a major part of your program is dependent on passing a piece of policy—of only writing political factors—list the name of the proposed or passed legislation. In the timeline mapping exercise you will provide more in-depth detailed information.

At the conclusion of the timeline mapping session, consider providing participants with a clear overview of next steps or recommendation that focus on action related to the social, political and economic context of your intervention.

For detailed information on the timeline mapping exercise, see the FSG timeline mapping tool on the resource slide.

Key Points to Consider

1. Evaluative thinking a way to think deeper about your work
2. Integrate evaluative thinking into existing structures
3. Clarify that the purpose of evaluative thinking isn't to criticize BUT to encourage discussion and transparency
4. Develop interactive exercises to facilitate evaluative thinking

Now that you have your have gone through a few example exercises on how to incorporate evaluative thinking into your organization's evaluation work. Let's consider a few points to remember.

First, evaluative thinking is not a one off exercise or really and activity at all. Evaluative theory is a way of doing evaluation— that will ultimately provide more in-depth higher quality evaluation work. Also before you think about engaging in new evaluative capacity activities— engage your leadership early and in a meaningful way. Share any resources or tools that you find useful to start a conversation around evaluation capacity building and evaluative thinking. You might even share this coffee's break resources as a way to facilitate a new way of doing evaluation. If your organization's leadership is not too keen on evaluation—refer back to the questions earlier in this presentation on slide 9— that say if we ask these questions— we will get this.

Next, be clear with your intention for incorporating evaluative thinking into your practice. The intention of evaluative thinking is NOT to criticize the work or outcomes of your organization--- but should be used to engage in discussion and transparency about what's going on in your program or agency.

Lastly, a useful approach to facilitate evaluative thinking is through intentional learning strategies. You might consider using the exercises discussed today or have others that you've used previously that will be useful for your organization for improving your evaluative thinking skills.

Resources

- ▶ AEA365 Blog Post. Author: Tom Archibald. *The Great Evaluative Thinking Scavenger Hunt at Evaluation 2015*
 - ▶ <http://aea365.org/blog/eval15-week-tom-archibald-on-the-great-evaluative-thinking-scavenger-hunt-at-evaluation-2015/>
- ▶ Evaluation Capacity Building
 - ▶ <http://aea365.org/blog/category/organizational-learning-and-evaluation-capacity-building/>
- ▶ FSG (see the resource below for the chalk talk and data placemats exercise)
 - ▶ <https://www.fsg.org/tools-and-resources/facilitating-intentional-group-learning>
- Timeline mapping:
 - <https://www.fsg.org/tools-and-resources/guide-timeline-mapping>

- Here are some resources that may be useful as you engage your evaluation stakeholders into the evaluative thinking process. The resources on this page includes a blog post on evaluative thinking, a list several blog posts on evaluation capacity building and organizational learning, which are both from the American Evaluation Association blog AEA365. I've also listed links to the learning exercises discussed in this presentation from FSG.
- Now, I'll turn the floor back to you Sharada.

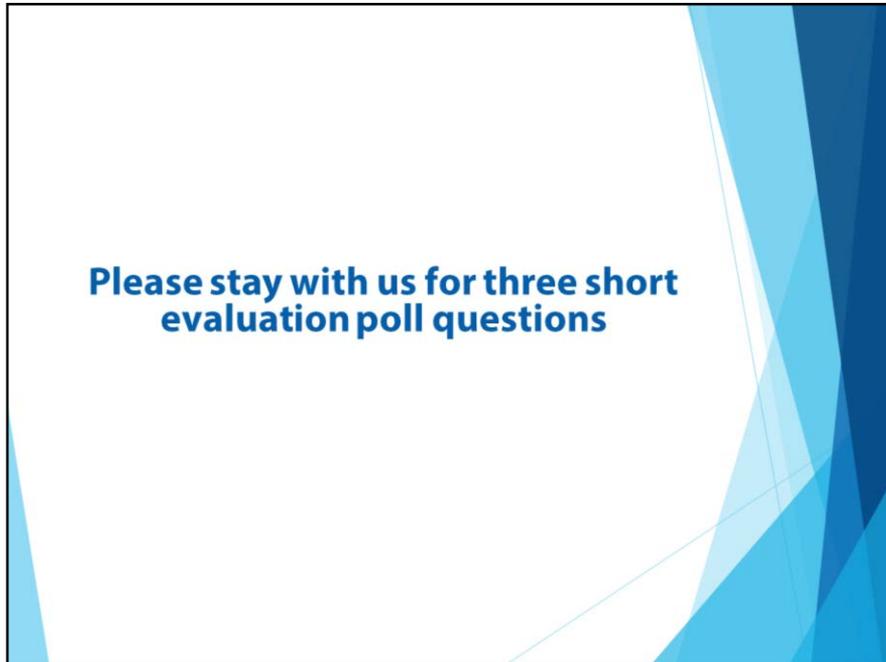
Any Questions?



MODERATOR:

At this time, we'll take an questions but first we'll check to see if any questions have come in through the Q&A box.

**There were no questions from the audience.



MODERATOR:

Next, please stay with us for three short poll questions.

Please allow a few seconds for the poll to pop up on your screen. We will pause for a few moments after the question is presented to give you time to answer. One moment everyone.

Moderator present poll question. Make sure to read the following after presenting each.

question should be showing, it read **[read question and potential answers]**

Please respond with the appropriate answer at this time.

- 1.This coffee break was worth while for me (yes, no, unsure)**
- 2. The level on information was (too basic, about right, beyond my needs)**
- 3. Considering that this presentation was brief it was (excellent, good, fair poor)**

Thank you for your feedback, that concludes our poll for today

Reminders!

All sessions are archived and
the slides and script can be accessed at:

<https://www.cdc.gov/dhdsp/pubs/webcasts.htm>

If you have any questions, comments, or topic
ideas send an email to:

AREBheartinfo@cdc.gov

Thank you for your participation!

As a reminder, all sessions are archived and the slides and script can be accessed at our Division website. Today's slides will be available in 2-3 weeks.

If you have any ideas for future topics or questions, please contact us at the listed email address on this slide.



THANK YOU



MODERATOR:

Our next Coffee Break is scheduled for Tuesday, July 10th and is entitled Conducting Cost Analyses for Public Health Programs

Thank you for joining us. Have a terrific day everyone. This concludes today's call.