This workshop covers the fundamentals of conducting useful, meaningful, and credible qualitative evaluations, and reviews recent developments that are especially applicable to development contexts. The course includes strategies for selecting cases (purposeful sampling), in-depth interviewing, and qualitative applications for different kinds of evaluations (for example, both implementation evaluation and impact evaluation). Cross-program synthesis approaches for generating high quality lessons learned is included. Participants will also gain an understanding of the crucial significance of adapting, evaluating, and understanding interventions holistically within local contexts. Different approaches to qualitative evaluation will be reviewed, including participatory approaches, systems thinking, and developmental evaluation for complex interventions.

Case study methods, in-depth interviews, and systematic observations illuminate beneficiary perspectives and experiences, resulting in findings that can be applied to both ongoing program improvements and policy-level decision making. The emphasis of the workshop, therefore, is on conducting useful and practical evaluations that are appropriate for and adapted to particular intended uses, intended users, development circumstances, and political situations, basically a contingency-oriented approach. The relationship between monitoring and qualitative evaluation will be examined from this perspective, as will be mixed methods designs. Ethical issues in conducting qualitative evaluations in development contexts will also be discussed. Participants will learn and apply new directions in qualitative evaluation. Throughout the workshop, participants will have opportunities to design qualitative evaluations that fit their own circumstances and responsibilities.

Bio

Michael Q. Patton is an independent evaluation and organizational development consultant. He is former president of the American Evaluation Association and author of two widely used evaluation textbooks: Utilization-Focused Evaluation and Qualitative Research and Evaluation Methods. He is the only recipient of both the Myrdal Award for Outstanding Contributions to Useful and Practical Evaluation Practice from the Evaluation Research Society and the Lazarsfeld Award for Lifelong Contributions to Evaluation Theory from the American Evaluation Association. He was program co-chair for the international evaluation conference in Toronto in 2005 and a keynote speaker at the African Evaluation Association conference in Niger in January 2007. In addition to qualitative evaluation, Dr. Patton’s areas of expertise include organizational development, strategic planning, policy analysis, group facilitation, and systems analysis. His most recent book, with two Canadian co-authors, is Getting to Maybe: How the World Is Changed. This book looks at social innovation from a complex systems perspective. Dr. Patton has been an IPDET instructor from its beginning.
Workshop Agenda

Morning 1: Participant introductions, including issues and concerns.
Opening participant exercises on qualitative pattern analysis
The particular niche and contributions of qualitative evaluation in the larger context of evaluation approaches and methods. Why and when to conduct qualitative evaluations? Qualitative evaluation and the evaluation standards.

Afternoon 1: Stories in qualitative data collection and analysis: gathering stories, analyzing stories, and reporting stories in ways that are meaningful and credible.
Utilization-focused evaluation as context. Exercise on evaluation logic.
Participant exercise on a complete qualitative study, from data collection to model building. Applications to participant situations.

Morning 2: Selecting cases in qualitative evaluation: Purposeful sampling
Evaluation findings depend on what is sampled. Qualitative sampling is one of the least understood and most challenging aspects of qualitative evaluation -- and at the center of issues that affect credibility and utility, especially because qualitative samples tend to be small. Samples can involve different units of analysis (e.g., individuals, families, villages, project sites, regions, events, etc.) There are several distinct strategies for case selection in purposeful sampling.
Participants will practice designing qualitative evaluations using purposeful samples.

Afternoon 2: Design issues in qualitative evaluation. Matching designs to purposes. Design options and their implications.
Mixed methods designs. Case studies.
Monitoring and evaluation (M & E) from a qualitative perspective.
Participants work in groups to design evaluations to fit their own situations.
Evaluation skills: Interviewing as a skill; issues in cross-cultural interviewing; interviewing options and strategies.
Integrating interviewing and observations in fieldwork

Morning 3: Alternative frameworks for and approaches to qualitative evaluation, with special application to development contexts; paradigms and varying criteria of excellence.
New, creative directions in qualitative evaluation
Criteria for evaluating the quality of qualitative evaluations.
Systems and complexity approaches: Developmental evaluation

Participant practice applying different frameworks to their own projects and responsibilities

Afternoon 3: Ethical issues in the conduct of qualitative evaluations.
Political issues and sensitivity to values, local context, and different intended uses and intended users of evaluation.
Future directions.
Q & A related to participants’ applications
Course review and evaluation