

Abbreviated Resume

Jonathan A. Morell, Ph.D.

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Principal [4.669 Evaluation and Planning](#)
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Editor-in-Chief Emeritus [Evaluation and Program Planning](#)

Principles that guide my work

- Respect data, trust judgment.
- Jointly optimize methodological rigor and practical use.

Brief Biography

Jonathan A. Morell PhD (Jonny) is an organizational psychologist with extensive experience in the theory and practice of program evaluation. He believes that evaluation requires a systems approach because interventions produce complex outcomes, but that evaluations should be as simple and straightforward as possible. Jonny has been recognized by the American Evaluation Association, who awarded him their Paul F. Lazarsfeld Evaluation Theory Award.

Jonny has lectured and consulted internationally on complexity in evaluation. His activity deals with the integration of agent based modeling and traditional evaluation, methodologies for evaluating unintended consequences, interactions among models and empirical data, and how to conduct dialogue between funders and evaluators concerning complex behavior.

Two works that exemplify his approach to complexity and unintended consequences are:

- [Evaluation in the Face of Uncertainty: Anticipating Surprise and Responding to the Inevitable](#) and
- [From Firefighting to Systematic Action: Toward A Research Agenda for Better Evaluation of Unintended Consequences](#)

He also uses social media heavily to popularize his views.

- Website www.jamorell.com
- Blog www.evaluationuncertainty.com.
- YouTube <https://www.youtube.com/channel/UCqRIJjhqmy3ngSB1AF9ZKLg>

Current and Recent Research and Evaluation

- Evaluation of unintended outcomes
- Agent-based modeling as an evaluation and social research methodology
- Complex behavior as a framework for program theory, methodology, and analysis
- Application of project schedules as evaluation logic models and theories of change

Books, Articles, Reports

- Morell, J.A. (2018) Revealing Implicit Assumptions: Why, Where, and How? Prepared for Catholic Relief Services
- Morell, J.A. (2018) Linking Management and Evaluation: Project Schedules as Program Models *American Journal of Evaluation* <https://doi.org/10.1177/1098214018784198>
- Morell, J.A. Expert Workshop on Contribution Analysis: The Role of Complexity in Long Term Impact Analysis (2018) Center for Development Impact, Brighton, UK
- Morell, J.A. (2018) Systematic iteration between model and methodology: A proposed approach to evaluating unintended consequences *Evaluation and Program Planning* 68, 243 – 252
- Ranney, J. M. Davey, M., Morell, J.A., Zuschlag, M. and Kidda, S. (in publication, 2018 projected) *Confidential Close Call Reporting System (C3RS) Lessons Learned Evaluation Final Report* Federal Railroad Administration
- Ranney, J. M. Davey, M., Morell, J.A., Zuschlag, M. and Coplen, M. (in publication, 2018 projected) *Confidential Close Call Reporting System (C3RS) Lessons Learned Evaluation Midterm Report*
- Morell, J.A., Davey, M., Ranney, J., Zuschlag, M., Cantu, M. (2018) *Transforming Railroad Safety with the Confidential Close Call Reporting System: Implementation, Impact, and Sustainability* Transportation Review Board Washington, 97th annual meeting, January 7th 11th. Washington DC
- Morell, J.A. (2017) "[From Firefighting to Systematic Action: Toward A Research Agenda for Better Evaluation of Unintended Consequences](#)". Unintended Effects of International Cooperation: An Academic & Policy Cross-over Conference. The Hague, January 16-10.
- Ayob, A.H. and Morell, J.A. (2016) The historical path of evaluation as reflected in the content of Evaluation and Program Planning. *Evaluation and Program Planning* 58, 1, 20-27
- Ayob, A.H. and Morell, J.A. (2016) [The historical path of evaluation as reflected in the content of Evaluation and Program Planning](#). *Evaluation and Program Planning* 58, 1, 20-27
- Morell, J.A. (2016) *Applying Analytical Hierarchy Process to Needs Assessment in the Federal Railroad Administration's Energy, Environment, and Engine Program*. Federal Railroad Administration, Office of Research and Development
- Morell, J.A. (2015) *Needs Assessment Methodology for the Rail Energy, Environment and Engine (E3) Technology Research Program* Federal Railroad Administration, Office of Research and Development
- Morell, J.A. (2015) *Railroaders Identifying Digital Distractions: Evaluation of a Peer to Peer Pilot Program at the Norfolk Southern Railroad* Norfolk Southern Railroad
- Morell, J.A. (2015) *Evaluation of the Federal Railroad Administration's Autonomous Track Geometry Measurement System Research and Development Program* Federal Railroad Administration, Office of Research and Development
- Morell, J.A. (2014) *Project/Program/Portfolio Outcome Monitoring (POM) Tool*. Program Federal Railroad Administration, Office of Research and Development (Demonstration available upon request.)
- Ranney, J.M., Davey, M., Morell, J.A., and Raslear, T. (2015) [Confidential Close Call Reporting System \(C3RS\): Lessons Learned Team Baseline Phase Report](#) Federal Railroad Administration DOT/FRA/ORD-15/08
- Parunak H. V.D. and Morell, J.A. (2014) [Emergent Consequences: Unexpected Behaviors in a Simple Model to Support Innovation Adoption, Planning, and Evaluation](#) in Kennedy W.G.,

Agarwal N. and Yang, J. S. eds. *Social Computing, Behavioral-Cultural Modeling, and Prediction*

- Morell, J.A., Hilscher, R., Magura, S. and Ford, J. (2010) [Integrating Evaluation and Agent-Based Modeling: Rationale and an Example for Adopting Evidence-Based Practices](#) *Journal of Multidisciplinary Evaluation*, Vol. 6, No 14, 35 - 57
- Morell, J.A. (2010) [Evaluation in the Face of Uncertainty: Anticipating Surprise and Responding to the Inevitable](#) Morell, J.A., Guilford Press, N.Y.
- Morell, J. A. (2005). Why are there unintended consequences of program action, and What Are the Implications for Doing Evaluation? *American Journal of Evaluation*, 26(4), 444 – 463
- Morell, J.A., Hanssen, Thompson, D. Wallace, R. and Wygant, B. (2006) [Confidential Close Call Reporting in the Railroad Industry: A Literature Review to Inform Evaluation](#) Federal Railroad Administration
- Morell, J. A. (1982). [Threats to the Utility of Social Science](#). *American Behavioral Scientist*, 26(2), 265-280. doi:10.1177/000276482026002008

Representative [Blog](#) Posts and Presentations

- [Systematic Iteration Methodology: A Proposed Approach to Evaluating Unintended Consequences](#) American Evaluation Association, 2018
- [Working with Assumptions: Understanding how Evaluators Make Decisions about Capturing Reality/Context](#) American Evaluation Association, 2018
- Applying Complexity to Make Practical Decisions About Evaluation [Part 1](#), [Part 2](#), [Part 3](#)
- [Are Policy Makers, Program Designers and Managers Doing a Good Job if they Rely Too Much on Evaluation?](#) July 2017
- [Some Musings on Evaluation Use in the Current Political Context](#) May 2017
- [Invitation to a Conversation Between Program Funders and Program Evaluators: Complex Behavior in Program Design and Evaluation](#) Feb 2017
- [Joint Optimization of Uncorrelated Outcomes as a Method for Minimizing Undesirable Consequences of Program Action](#) Dec. 2016
- [A simple recipe for improving the odds of sustainability: A systems perspective](#) June 2016
- [Things to think about when observing programs from a systems perspective](#) April 2016
- [Depicting Complexity in 2-D](#) March 2016
- Drawing on complexity to do Hands-on Evaluation (Parts [1](#), [2](#), and [3](#)) Jan 2016
- [A Complex System Perspective on Program Scale-up and Replication](#) Oct 2015
- [Timelines, Critical Incidents and Systems: A Nice Way to Understand Programs](#) Dec 2014
- [Complexity is about stability and predictability](#) Feb 2014
- [Program Logic, Program Theory, and Unintended Consequences: Understanding Relationships. Implementing Action](#) Oct 2014
- [How to evaluate complex health interventions?](#) Dec 2013
- [Matching management systems to system behavior](#) July 2013
- [Power Law Versus Symmetrical Distributions — Implications for Policy Recommendations](#) April 2013

[Videos](#)

- [Funder Evaluator Dialogue on Complexity](#) (1:04) Oct 2017
- [Why Program Funders and Evaluators Need to Talk About Complexity](#) (1:10) March 2017

- [Invitation to a Conversation Complex Behavior in Program Design and Evaluation](#) (0:50) Feb 2017
- [Part 1 Combining Agent Based Modeling and Traditional Evaluation](#) (6:52) Jan 2017
- [Part 2 Combining Agent Based Modeling and Traditional Evaluation](#) (20:19) Jan 2017
- [Part 3 Integrating Agent Based Modeling and Traditional Evaluation](#) (19:58) Jan 2017
- [Part 1 -- Drawing on Complexity to do Hands-on Evaluation: What is the Need for Complexity?](#) (3:38) July 2016
- [Part 2 -- Drawing on Complexity to do Hands-on Evaluation: Why Use Complexity When Programs Do Not?](#) (5:51) July 2016
- [Part 3 Drawing on complexity for hands on evaluation: Stability and Predictability](#) (16:56) Nov 2016
- [Evaluation Logic Models as Agent-based Simulations](#) (16:12) Sept 2015

Workshops

- Logic modeling
- Complexity in Evaluation (New: [Applying Complexity to Make Practical Decisions About Program Theory, Methodology, Data, and Stakeholder Engagement](#))
- Evaluating unintended consequences
- Audiences: American Evaluation Association, Canadian Evaluation Association, Australasian Evaluation Association, European Evaluation Society, Italian Evaluation Society

Professional Association Activity and Recognition

- Editor -in-Chief Evaluation and Program Planning
- Robert Ingle Service Award – American Evaluation Association
- Board Member – 2013 – 2015 – American Evaluation Association
- Paul F. Lazarsfeld Evaluation Theory Award – American Evaluation Association

Work History

- Founder and owner, [4.669 Evaluation and Planning](#)
- [Syntek Technologies](#) (formerly Fulcrum Corporation), Director of Evaluation 2010 – present
- Vector Research Center Ann Arbor, Michigan 2006 – 2010 Senior Policy Analyst
- New Vectors, LLC 2005 – 2006 Senior Policy Analyst
- Altarum Institute (successor to ERIM) 1998 – 2005 Senior Policy Analyst
- Industrial Technology Institute, Ann Arbor MI: Principal Member Technical Staff, 1988 - 1998
- Martin Marietta Energy Systems, Oak Ridge National Laboratory, TN: Technical Staff,
- 1985 – 1988 Technical Staff
- Hahnemann University, Philadelphia PA: Associate Director and Professor, Graduate Program in Evaluation, 1975 - 1985

Educational History

- Bachelor of Science (Sociology) McGill University, Montreal Canada, 1968
- Ph.D. (Social Psychology) Northwestern University, Evanston IL. 1974