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Evaluation and Planning

This document provides links to reports, articles, books and videos, grouped by topic category. For a Resume with bibliographical and source details of the work listed below, see: Resume.

Topics

Complex behavior in program theory, methodology and data interpretation

> Documents
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> Videos
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> Selected blog posts

Agent-based modeling in Evaluation

Unintended consequences

Logic models and Program Theory

Implicit assumptions

Thoughts on the Future of the American Evaluation Association

Industrial safety

History and development of Evaluation

Complex Behavior in Program Theory, Methodology, and Data Interpretation: Documents	
Applying Complexity to Make Practical Decisions About Program Theory, Methodology, Data, and Stakeholder Engagement	Workshop Slide deck
Role of complexity in Contribution Analysis	
Expert Workshop on Contribution Analysis: The Role of Complexity in Long Term Impact Analysis	Slide deck
Contribution Analysis and Estimating the Size of Effects: Can We Reconcile the Possible with the Impossible?	Conference paper
Applying complexity to make practical decisions about evaluation (AEA Coffee Break webinar series)	
Session 1	Slide deck
Session 2	Slide deck
Session 3	Slide deck

Complex Behavior in Program Theory, Methodology, and Data Interpretation: Videos	
Applying complexity to make practical decisions about evaluation (AEA Coffee Break webinar series)	
Session 1	Video (20 min)
Session 2	Video (20 min)
Session 3	Video (20 min)

Complex Behavior in Program Theory, Methodology, and Data Interpretation: Videos	
Funder Evaluator Dialogue on Complexity	Video (65 min)
Why Program Funders and Evaluators Need to Talk About Complexity	Video (70 min)
Invitation to a Conversation Complex Behavior in Program Design and Evaluation	Video (50 min)
Part 1 -- Drawing on Complexity to do Hands-on Evaluation: What is the Need for Complexity?	Video (4 min)
Part 2 -- Drawing on Complexity to do Hands-on Evaluation: Why Use Complexity When Programs Do Not?	Video (6 min)
Part 3 Drawing on complexity for hands on evaluation: Stability and Predictability	Video (17 Min)

Complex Behavior in Program Theory, Methodology, And Data Interpretation: Selected Blog Posts	
Emergence: Part 1 of 6 Posts on Evaluation, Complex Behavior, and Themes in Complexity Science	Blog
Power Law Distributions: Part 2 of 6 Posts on Evaluation, Complex Behavior, and Themes in Complexity Science	Blog
Networks and Fractals: Part 3 of 6 Posts on Evaluation, Complex Behavior, and Themes in Complexity Science	Blog
Unspecifiable Outcome Chains: Part 4 of 6 Posts on Evaluation, Complex Behavior, and Themes in Complexity Science	Blog
Consequences of Small Change: Part 5 of 6 Posts on Evaluation, Complex Behavior, and Themes in Complexity Science	Blog
Joint Optimization of Uncorrelated Outcomes: Part 6 of 6 Posts on Evaluation, Complex Behavior, and Themes in Complexity Science	Blog
A complexity perspective on a theory of change for long term program effects	Blog
What complexity theory do evaluators need to know?	Blog
Applying Complexity to Make Practical Decisions About Evaluation	Blog
Are Policy Makers, Program Designers and Managers Doing a Good Job if they Rely Too Much on Evaluation?	Blog
Some Musings on Evaluation Use in the Current Political Context	Blog
Invitation to a Conversation Between Program Funders and Program Evaluators: Complex Behavior in Program Design and Evaluation	Blog
Joint Optimization of Uncorrelated Outcomes as a Method for Minimizing Undesirable Consequences of Program Action	Blog
A simple recipe for improving the odds of sustainability: A systems perspective June 2016	Blog

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Complex Behavior in Program Theory, Methodology, And Data Interpretation: Selected Blog Posts	
[Things to think about when observing programs from a systems perspective](#)	Blog
[Depicting Complexity in 2-D](#)	Blog
[Drawing on Complexity to do Hands-on Evaluation (Part 1) – Complexity in Evaluation and in Studies in Complexity](#)	Blog
[Drawing on Complexity to do Hands-on Evaluation (Part 2) – Complexity in Program Operation, Simplicity in Program Design](#)	Blog
[Drawing on Complexity to do Hands-on Evaluation (Part 3) – Turning the Wrench](#)	Blog
[A Complex System Perspective on Program Scale-up and Replication](#)	Blog
[Complexity is about stability and predictability](#)	Blog
[How to evaluate complex health interventions?](#)	Blog
[Matching management systems to system behavior](#)	Blog

Agent-Based Modeling in Evaluation	
[The historical path of evaluation as reflected in the content of Evaluation and Program Planning](#)	Journal article
[Part 1 Combining Agent Based Modeling and Traditional Evaluation](#)	Video (7 min)
[Part 2 Combining Agent Based Modeling and Traditional Evaluation](#)	Video (20 min)
[Part 3 Integrating Agent Based Modeling and Traditional Evaluation](#)	Video (20 min)
[Evaluation Logic Models as Agent-based Simulations](#)	Video (16 min)
[Emergent Consequences: Unexpected Behaviors in a Simple Model to Support Innovation Adoption, Planning, and Evaluation](#)	Conference proceedings
[Integrating Evaluation and Agent-Based Modeling: Rationale and an Example for Adopting Evidence-Based Practices](#)	Journal article

Unintended Consequences	
[Systematic iteration between model and methodology: A proposed approach to evaluating unintended consequences](#)	Journal article
[From Firefighting to Systematic Action: Toward A Research Agenda for Better Evaluation of Unintended Consequences](#)	Conference paper
[Evaluation in the Face of Uncertainty: Anticipating Surprise and Responding to the Inevitable,](#)	Book

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Unintended Consequences	
[Why are there unintended consequences of program action, and What Are the Implications for Doing Evaluation?](#)	Journal article

Logic Models And Program Theory	
[Systematic Iteration Methodology: A Proposed Approach to Evaluating Unintended Consequences](#)	Slide deck
[Linking Management and Evaluation: Project Schedules as Program Models](#)	Journal article
[Timelines, Critical Incidents and Systems: A Nice Way to Understand Programs](#)	Blog post
[Program Logic, Program Theory, and Unintended Consequences: Understanding Relationships. Implementing Action](#)	Workshop slides
[Logic Models Beyond the Traditional View:](#) [Metrics, Methods, Format and Stakeholders](#)	Workshop slides
[Logic Models as Simple Pictures - and So Much More](#)	Video (21 min.)

Implicit Assumptions	
[Working with Assumptions: Understanding how Evaluators Make Decisions about Capturing Reality/Context](#)	Slide deck
[Revealing Implicit Assumptions: Why, Where, and How? Prepared for Catholic Relief Services](#)	Report

Thoughts on the Future of the American Evaluation Association	
Making AEA, and Evaluation Relevant in the Future	
[Part 1 What is Diversity?](#)	Blog
[Part 2 AEA as an Evolving Organism](#)	Blog
[Part 3 Evolution, Diversity and Change from the Middle](#)	Blog

Industrial Safety	
[Evaluation of the Federal Railroad Administration's Autonomous Track Geometry Measurement System Research and Development Program](#)	Report
[C3RS: Midterm Accomplishments at Another Site and Success Factors Across Sites](#)	Report
[C3RS is Implementing Corrective Actions and Expanding Within the Railroad Industry](#)	Report

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Industrial Safety	
[Confidential Close Call Reporting System (C3RS): Lessons Learned Team Baseline Phase Report](#)	Report
[Continued Improvements at One C3RS Site](#)	Report
[Update from C3RS Lessons Learned Team: Safety Culture and Trend Analysis](#)	Report
[Update from C3RS Lessons Learned Team: Four Demonstration Pilots](#)	Report
[Evaluations of Demonstration Pilots Produce Change](#)	Article
[Another C3RS Site Improves Safety at Midterm](#)	Report
[Derailments Decrease at a C3RS Site at Midterm](#)	Report
[Senior Cross-Functional Support— Essential For Implementing Corrective Actions At C3rs Sites](#)	Report
[Confidential Close Call Reporting in the Railroad Industry: A Literature Review to Inform Evaluation](#)	Report

History and Development of Evaluation	
[The historical path of evaluation as reflected in the content of Evaluation and Program Planning](#)	Journal article

Recent additions

[Can Knowledge of Evolutionary Biology and Ecology Inform Evaluation?](#)

[A Model for Evaluation of Transformation to a Green Energy Future](#)

http://www.jamorell.com/documents/Complexity_workshop_AEA_2019_published.pdf