

Jonathan A. Morell, Ph.D.

2279 Mershon Drive
Ann Arbor, MI 48103
(734) 995-1795 home
(734) 646-8622 mobile

jmorell@fulcrum-corp.com
jmorell@jmorell.com
website: www.jmorell.com
blog: www.evaluationuncertainty.com

Current position: Director of Evaluation, Fulcrum Corporation

Summary of current work

- Evaluation of behavioral-based safety innovations
- Planning and evaluation of large-scale organizational change
- Evaluation methodology for unintended consequences
- Integration of traditional evaluation and complex adaptive systems
- Logic models – integration with metrics, methodology and knowledge transfer

Publications

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*](#) 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. (2005) Product evaluation *Encyclopedia Of Evaluation* Sandra Mathison, Ed. Sage Publications, Thousand Oaks CA

Morell, J.A. (2005) Complex adaptive systems *Encyclopedia of Evaluation* Sandra Mathison, Ed. Sage Publications, Thousand Oaks CA

Morell, J. A. (2004) Evaluating the Impact of Electronic Business Systems: Lessons Learned from Three Cases at the Defense Logistics Agency

Morell, J.A. (2004) Harnessing Technology for Evaluation: A Conversation With Jonny Morell *The Evaluation Exchange* , Volume X, No. 3, Fall 2004

Morell, J. A. (2003) Evaluating the impact of an electronic business system in a complex organizational setting: The case of Central Contractor Registration, *Evaluation and Program Planning* 26, 4 , 429-440

- Morell, J.A (2000) Internal evaluation: A synthesis of traditional methods and industrial engineering . *American Journal of Evaluation* 1, 41-52
- Morell, J.A. and Brown, M. E. (1999) Business-to-Business EC Activity in Small Manufacturers *Journal of Electronic Commerce* 12 #2
- Morell, J.A., and Hetzner, W.A. (1998) Creating Support Web Sites: What Worked, What Didn't, and Why *EDI Forum: The Journal of Electronic Commerce* 11, 3, 42 - 47
- Morell J. A. (1997) Metrics and Models for the Evaluation of Supply Chain Integration *EDI Forum*, 10, 1, 14-23
- Morell, J.A., and Stewart S (1996) Standards development for information technology: Best practices for the United States chapter in *Developing Standards for the National Information Superhighway* MIT press
- Morell J.A (1996) Guest Editorial: Thinking about best practices for standards" *StandardView* 4,1,1-3, ACM, New York
- Morell, J.A., Neal R.W., and Fries V. (1995) EDI: A Double-Edged Sword" *Actionline*, Nov. 40-43
- Morell, J. A., Neal, W., and Fries, V. (1995) Making Electronic data interchange: Add value to small and medium sized manufacturing V. *Electronic Markets* 16/17, 9-10
- Morell, J.A. (1995) The Role of Information Technology in Strategies for Organizational Improvement *International Journal of Computer Applications in Technology* 8, 1-2, 103 - 106
- Morell, J.A. (1995) Integrating technological change into planning: The case for an Interdisciplinary perspective *Socio-Economic Planning Sciences* 219-226
- Morell, J. and Stewart, S. L. (1994) Best Practices for IT Standards Development -- Toward Discovery and Application *IEEE Standards Bearer* 8,4, 4 - 5
- Morell, J.A. (1994) Standards and the market acceptance of Information technology: An exploration of relationships *Computer Standards and Interfaces* 16: 321-329 Morell, J.A. (1992) Industrial productivity: New perspectives for a traditionally trained evaluator *Evaluation Practice*, 13, 2, 125 134) Morell, J.A. (1991) Modernizing information systems: A comparison of scientific and technological research perspectives *Evaluation and Program Planning* 14,391-395
- Fleisher, M. and Morell, J.A (1991) The impact of computer systems: Revolution or incremental change?" Chapter 1 in: J. Morell and M. Fleischer (eds) *Advances in the Implementation and Impact of Computer Systems* JAI publications, Greenwich CT
- Rogers, G.O., Sorensen, J.H. and Morell, J.A (1991) Using information systems in emergency management in: J. Morell and M. Fleischer (eds) *Advances in the Implementation and Impact of Computer Systems* JAI publications, Greenwich CT.
- Morell J.A. and Sutherland, D. (1990) Managerial employment and Information technology - An exploration of organizational dynamics *Office System Research Association Journal* Spring, 15 - 25

- Morell, J. A. (1990) Evaluation - Status of a loose coalition *Evaluation Practice* 11,3, 213 - 219
- Morell, J. A. (1990) The impact of information technology on research *Computers in Social Science*, 2, 255 - 271 JAI Press, Greenwich CT
- Morell, J.A. and Fleisher, M. (1988) "The use of office automation by managers: How much and to what purpose?" *Information and Management* 14, 205 - 210
- Morell, J.A., and Fleisher, M. (1988) Managers and office automation: A framework for understanding potential *Office Systems Research Journal* 7, 1, 19 - 25
- Fleisher, M. and J. A. Morell, (1988) The use of office automation by managers: A survey *Information Management Review* 4, 1, 29 - 40
- Morell, J. A. Planning in prevention: Implications from a general model chapter 1 pages 9-20 in Jared Hermalin and Jonathan A. Morell *Prevention Planning in Mental Health* 1987, Sage Publications
- Morell, J. A. and J. Leemon (1987) Assessment of an effort to integrate computer functions in an engineering design firm *Data Base* 18, 2 17-21
- Morell, J. A. (1986) Why should community psychologists be concerned with new generation information technologies? *The Community Psychologist* 19,2, 20
- Fleischer M. and Morell, J. A. (1985) The organizational and managerial consequences of computer technology *Computers in Human Behavior* 1. 83 - 93 Pergamon Press
- Morell, J. A., and Weirich, T. W. (1983) Determining the costs of evaluation: Principles from mental health chapter 6 pages 81-100 in *The Costs of Evaluation* eds. Marvin C. Alkin and Lewis C. Solomon Sage, Thousand Oaks CA
- Morell, J. A. (1982) Threats to the utility of social science *American Behavioral Scientist* 26, 2, 265 - 280
- Morell, J. A., (1981) Evaluation in prevention: Implications from a general model *Prevention in Human Services* . 1, 7 - 44
- Morell, J. A. (1979) Follow-up research as an evaluation strategy chapter 9, pages 217-248 in Theodore Abramson, Carol Kehr Tittle and Lee Cohen *Handbook of Vocational and Educational Evaluation* Sage, 1979
- Morell J.A. (1979) *Program evaluation In social research* Pergamon Press 1979
- Morell, J. A. Evaluating outcome in correctional drug abuse rehabilitation programs Chapter 4 pages 79 - 104 in Jerome J. Platt, Christina Labate and Robert J. Wicks, eds. *Evaluative Research in Correctional Drug Abuse Treatment* Lexington Books
- Flaherty, E. W., and Morell, J. A. (1978) Evaluation: manifestations of a new field *Evaluation and Program Planning* 1, 1-10

Conference Presentations

Morell, J.A. (2011) Applying Concepts in “Complexity” to Complex Environmental Evaluation Annual forum of the Environmental Evaluators Network, June 23-24, Washington D.C.

Morell, J.A. (2011) Evaluation of Unintended Consequences of Development Efforts: Building Evaluation Capacity in Support of Development and Democracy U.S. Department of State, 4th Annual Conference on Program Evaluation: “Diplomacy, Development and Defense – Evaluating Foreign Policy June 7 – 8, Washington DC

Morell, J.A., Ranney, J. and Zuschlagm M. (2010) Evaluation Utilization and the Story of the Federal Railroad Administration’s 10 Year Research and Development Effort to Change Safety Culture in the United States Rail Industry: Overview of Safety Culture Evaluation Designs American Evaluation Association San Antonio TX Nov 10 - 13.

Magura, S., Hilscher, R. Belding, T. and Morell, J.A. (2010) Agent Based Modeling (ABM) Simulation for Program Evaluation American Evaluation Association San Antonio TX Nov 10 - 13

Morell, J.A. (2010) Model Forms, Program Theory, And Unexpected Behavior: What Are the Implications For Program Implementation and Evaluation? Evaluation American Evaluation Association San Antonio TX Nov 10 - 13

Morell, J.A. (2008) Taking a Systems Lens to Health Inequalities: Lessons from System Evaluation Approaches Evaluation and Inequalities Summer School Program, Edinburgh Evaluation Programme at the University of Edinburgh

Morell, J.A.; Sridharan, S.; Pawson, R.; and Mark, M.; (2008) Evolutionary or Quasi-experimental Evaluation Approaches: Schism, Synthesis, or Peaceful Co-Existence? European Evaluation Society Lisbon Oct. 1-3

Morell, J.A. (2008) Expert Lecture: Evaluating in the Face of Uncertainty: Anticipation and Agility to Improve Evaluation Quality American Evaluation Association Denver CO Nov 5-8

Morell, J.A. (2008) Meta-logic Model for Evaluating Safety Programs: Uses and Limitations American Evaluation Association, Baltimore MD Nov. 7-10

Coplen, M., and Morell, J.A. (2007) Impact of Federal Safety Risk Reduction Programs: Evaluation Experience and Lessons Learned From Three Government Agencies Efforts to Improve Industry Safety American Evaluation Association, Baltimore MD Nov. 7-10

Morell, J.A., Eoyang, G., and Wasserman, D. (2007) Unintended Consequences of Program Action: When are They Problematic for Evaluation, and What Can We Do About Them? American Evaluation Association, Baltimore MD Nov. 7-10

Morell, J.A. (2006) Why are there unintended consequences, and what are the implications for doing evaluation? (Presentations at Michigan State University and the University of Montreal - part of a research program to collect cases.)

Morell, J.A. (2005) Ignoring evaluation as adaptive behavior: Using multiple evaluations to shift rational choice Joint Meeting of the American Evaluation Association and Canadian Evaluation Society Toronto, Oct 24th - 30th

Morell, J.A. (2005) Contending With unintended consequences: Theory and practice for evaluation Joint Meeting of the American Evaluation Association and Canadian Evaluation Society Toronto, Oct 24th - 30th

Morell, J.A. (2005) Why are there unintended consequences, and what are the implications for doing evaluation? Joint Meeting of the American Evaluation Association and Canadian Evaluation Society Toronto, Oct 24th - 30th

Schroeter, D.C. and Morell, J.A. (2005) Criteria for evaluating program sustainability within a multi-site context: A longitudinal approach Joint Meeting of the American Evaluation Association and Canadian Evaluation Society Toronto, Oct 24th - 30th

Morell, J.A. (2004) Evaluation in business and industry: Drawing parallels with other forms of evaluation Presidential Strand Address American Evaluation Association, Atlanta GA, November 3-6

Morell, J.A. (2004) Evaluating sustainability: A view informed by complex adaptive systems American Evaluation Association, Atlanta GA, November 3-6

Morell, J.A. (2003) Measuring the impact of information technology and electronic business systems in government settings American Evaluation Association, Reno NV Oct. 6-9,

Morell, J.A. (2003) System behavior in the programs we evaluate: Implications for theory, measurement, and methodology American Evaluation Association Reno NV Oct. 6-9

Andrea, D., Morell, J.A., and Swiecki, B. (2002) Event management in automotive supply chains: People, systems, and decisions technical presentation The Altarum Institute

Morell, J.A. (2002) Complex system theory as an approach to building evaluation theory American Evaluation Association Arlington VA Nov 6-10

Morell, J.A. (2002) Metrics development: Lessons learned from work with the defense E-Business program June 12, Integrated Acquisition Environment, Defense Logistics Agency

Morell, J.A., McAlinden, S., Phelps, T., and Swiecki, G. (2002) Automotive suppliers and E-Business: Co-evolution and the shape of the future E-Automotive Summit, Aug. 3 - 5, Pasadena CA 2001

Morell, J.A., Spicknall, M. and Bongiorno, B. (1999) Empirical data for better technology investment decisions American Evaluation Association, Chicago IL.

Morell, J.A. (1999) Making the right choices for supply chain management: How to develop a practical strategy to meet business objectives CASA/SME Oct. 22, 1999

Morell, J.A. (1997) Internal evaluation: A synthesis of traditional methods and industrial engineering American Evaluation Association, San Diego CA Nov 5 - 8

Morell, J.A. (1992) Productivity improvement in knowledge intensive organizations: Integrating the physical, social, and informational environments Workshop sponsored by the Steelcase Corporation, Grand Rapids MI ITI TR-92-01

Morell, J.A. (1992) Measuring the impact of knowledge work on organizational productivity workshop at the Industrial Technology Institute, 1992

Morell, J.A. (1992) Promoting technology deployment Proceedings of the DARPA workshop: Information Technology and Concurrent Engineering June 8 - 12

Morell, J.A. New standards requirements to support enterprise integration in the automotive and electronics sectors

Morell, J. A. (1990) Evaluation - status of a loose coalition Keynote Address, Eastern Evaluation Research Society, Villanova University,

Morell, J. A., Tornatzky, L. G., and Behm, J. (1990) CASE (Computer Aided Software Engineering) Implementation: Dynamics Through the Technology Life Cycle Software Engineering Institute, Carnegie Mellon University, Nov. 13

Morell, J.A. (1988) Diffusion of information through information centers' annual meeting of the Office Systems Research Association

Fleisher, M and Morell, J. A. (1986) Managers as information technology end users International Congress on Technology and Technology Exchange

Fleisher, M. and Morell, J.A. (1986) Managers as information technology end users Proceedings of the International Congress of Technology and Technology Exchange, October 6-8, Pittsburgh, Pennsylvania

Technical Reports

Davey M., Morell J.A., Ranney J. (in preparation) Confidential Close Call Reporting System (C3RS): Lessons Learned Baseline Report, Volpe National Transportation Systems Center / Federal railroad Administration

Morell, J.A., Coplen M., et. al. (2009) Data-Informed Decision Making in the Department of Transportation: Lessons Learned from the Cross-modal Risk Assessment Initiative, U.S. Department of Transportation

Morell, J.A., Hanssen, C., 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. (ongoing) Intellectual property piracy assessment of entertainment software

Morell, J.A., (2003) Hetzner, W., Nicholas, F., and Geth, R. *Final report for DLA aging aircraft initiative: Managing low volume parts*

Andrea, D. J., and Morell, J.A (2003) Revenue and financial margin life cycle management . Center for Automotive Research, Management Briefing Seminar, Traverse City MI. August,

Morell, J.A., and Andrea, D. (2003) Process efficiency and design rework at early stages of the vehicle product life cycle

Morell, J.A., Swiecki, B.F., and Andrea, D.J. (2002) Computer assisted collaboration in the automotive industry : What are the complex problems and how are decisions made? Center for Automotive Research, The Altarum Institute November

Morell, J.A., Swiecki, B.F., and Andrea, D.J. (2002) Automotive suppliers and the revenue acquisition process: What's working, and what's not?

Morell, J.A., Swiecki, B.F (2002) E-readiness of the automotive supply chain: Just how wired is the supplier sector? The middle view up and down the supply chain (Second in the series, focus on mid-tier suppliers)

Morell, J.A., Swiecki, B.F (2001) E-readiness of the automotive supply chain: Just how wired is the supplier sector? (First in the series, focus on first tier suppliers).

Morell, J.A., and Phelps, T.A. (2000) A Review of Interoperability Issues In the Automotive Industry : A White Paper produced for NACFAM

Kohler, R.E., Morell, J.A. and Hetzner, W. Delphi requirements analysis for the defense sustainment consortium

Morell, J.A. et .al. (1999) *Evaluation of the DoD's Electronic Commerce Resource Centers*

J.A. Morell, et. al. (1997) *Evaluation of Simulation for CNC Training in a Community College Setting*

Morell, J.A. *Virtual Focus Group - How will electronic commerce affect small and medium sized manufacturers?*

Morell, J.A Web (1996) Use by manufacturing consultants: The case of field agents in the NIST/MEP System

Morell J.A, Neal W., and Fries V. (1995) *EDI use in 255 manufacturing firms: A survey*

Morell, J. A. (1992) Improving the deployment of open system technology: European lessons from the Manufacturing Automation Protocol

Morell, J.A. (1987) Personal and organizational consequences of microcomputer use in the naval military personnel command Oak Ridge National Laboratory TM-10498,

Morell, J. A. (1985) *A Review of Social Science Perspectives on Event Classification and Offsite Notification in the Nuclear Industry* Report prepared for the Oak Ridge National Laboratory as part of work for the Nuclear Regulatory Commission NRC FIN #BO-490

Workshops, Teaching Technical Support

Workshops Presently Active

- [Logic Models - Beyond the Traditional View: Metrics, Methods, Expected and Unexpected Change](#)
- [Evaluation in the Face of Uncertainty](#) (Based on: Morell, J.A. Evaluation in the Face of Uncertainty: Anticipating Surprise and Responding to the Inevitable, Guilford Press, NY, 2010)

Workshops

Numerous training sessions on evaluation methods, evaluation of R&D, logic models, and the theory and practice of dealing with unintended consequences. (Workshops range from half day to two days.) Audiences include:

- American Evaluation Association
- Australasian Evaluation Society
- European Evaluation Society
- Federal Railroad Administration
- Michigan State University
- Transportation Review Board
- University of Edinburgh
- U.S. Department of Transportation
- Volpe National Transportation Systems Center
- Western Michigan University

Teaching

As Professor and Associate Director of the graduate program in Evaluation at the Hahnemann Medical College, I taught many evaluation and evaluation related courses

Technical Support

Digital Library in support of government Acquisition and Supply Chain Management

Assessing training needs for Intelligent Transportation Systems: a Web-based focus group

Manufacturing Information Resource Locator (Electronic Commerce Section): A Web-based technical assistance system for MEP field agents

Implementing EDI With Your Suppliers, 2 day course developed for the Automotive Industry Action Group

Electronic Commerce for Non-technical Managers: The Business Perspective, 1 day course developed for Thompson Electronic Commerce Resources

Implementation and Managing Change: A Guide for Assessing Information Technology, Morell, J. A., R. Gryder, and Fleisher, M 1987, Oak Ridge National Laboratory, Oak Ridge TN ORNL TM-10520

Editorial and Advisory Activity

Present

Editor -in-Chief *Evaluation and Program Planning* Elsevier

Past

e-Health Technology Initiative, Robert Wood Johnson Foundation

State Technology Evaluation, U.S. Department of Education

America Editor *International Journal of Electronic Business* Inderscience

Associate Editor for Electronic Commerce for the *International Journal of Services Technology Management* Inderscience

Editorial Board *StandardView* 1995 - 1998 ACM

Editor, Best Practices in the Development of Standards for Information Technology special issue of *StandardView*

Editor, *Electronic Commerce in Manufacturing and Transportation* special issue of EDI Forum

Editor annual volume *Advances in the impact and implementation of computer systems* 1991-2
JAI press

Editorial board research annual *Social Science and Computers* 1991 JAI press

Editorial Board Executive newsletter on Computer Aided Software Engineering 1990-91

Editorial Board *Knowledge in Society* 1988-94

Ms. Reviewer *Computers in Human Behavior* 1987-1990

Professional Association Activity

Founding Member – Topical Interest Group Systems in Evaluation AEA

Chair, Electronic Communications Committee AEA

Active member and various leadership positions in Topical Interest Groups: Business and Industry; Research, Technology & Development; International and Cross Cultural AEA

President, Eastern Evaluation Research Association AEA

Awards and Honors -- American Evaluation Association

1995 Robert Ingle Service Award

2010 Paul F. Lazarsfeld Evaluation Theory Award

Work and Educational History

Fulcrum Corporation - present

Vector Research Center Government Solutions Inc. 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 of the 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