

THIRD EDITION

HANDBOOK OF PRACTICAL PROGRAM EVALUATION

JOSEPH S. WHOLEY
HARRY P. HATRY
KATHRYN E. NEWCOMER
EDITORS

PREFACE

Our main objective in this handbook has been and continues to be to make the practice of program evaluation as accessible and practical as possible. This third edition introduces many changes aimed at considerably improving the contents so as to better meet this objective.

We asked all the chapter authors to keep their chapters to strict page limits and to keep the language readable. Their cooperation in these matters allowed us to add a number of chapters on new subjects, further improving this handbook's practicality and usefulness. These new subjects address

- Engaging and working with stakeholders (Chapter Two)
- Conducting exploratory evaluation (Chapter Four)
- Contracting for evaluations (Chapter Twenty-Six)
- Using more kinds of qualitative evaluation methods, such as semi-structured interviewing and "collecting stories" (Chapters Sixteen and Eighteen)
- Recruiting and retaining program participants in evaluation studies (Chapter Nine)
- Using the Internet for evaluation studies (Chapter Fifteen)
- Designing, managing, and analyzing multisite evaluations (Chapter Ten)
- Formulating options and recommendations for program improvement (Chapter Twenty-Four)
- Understanding the politics of evaluation (Chapter Twenty-Seven)

Intended Audience

The intended audience for this handbook includes (1) managers, management analysts, policy analysts, and evaluators in federal, state, and local governments and school districts; (2) managers and analysts in foundations and nonprofit organizations; (3) independent evaluators, auditors, and management consultants; and (4) faculty members and students in professional schools, such as schools of public policy, public administration, business administration, education, public health, and social work.

The information presented here is intended to help those involved in program evaluation, those who fund programs and evaluation studies, those who operate programs, those who are staff members in the legislative and executive branches of government, those in universities, and those in the consulting world—both individuals new to evaluation and experienced evaluators (who may find new ideas to add to their current toolkit). Even though the language is U.S. English and the authors are primarily people who live and work in the United States, the material presented here should be applicable in any country.

Scope

Considerable diversity exists in the training and skills possessed both by those charged with evaluating public and nonprofit programs and by program managers and staff members seeking to collect useful data on their programs.

Evaluators and program managers may have a variety of evaluation objectives in mind. They may have specific questions, or they may be unsure of how to frame useful questions about their programs. Careful analysis of the program to be evaluated and the context in which it operates is a significant precursor to the planning and design of any evaluation endeavor. Identification of the theory underlying the program and the contextual factors that affect its operations and success is critical.

This handbook covers a variety of approaches to analyzing the operations and results of past and current programs. Guidance for designing ongoing program performance monitoring systems is provided, along with advice on designing and implementing studies of program processes and program outcomes. A variety of evaluation approaches are discussed, including both qualitative and quantitative approaches for evaluating program impact. (Note that except in discussions about ways for evaluators to develop options and recommendations for program improvement, the term *program evaluation* as used in this handbook does not include assessing the effectiveness of *future* programs.)

The program evaluation approaches and tools covered here may provide feedback on program expenditures, program operations, or program results. They can be useful in developing new legislative proposals and in reauthorizing existing programs; in developing, debating, and deciding among budget alternatives; in implementing, operating, and improving public programs and programs operated by for-profit or nonprofit organizations; and in managing, auditing, and reporting on the uses of public funds.

Need for Program Evaluation

The demand for program evaluation information is growing. Congress, state legislatures, local legislative bodies, public agencies, foundations, nonprofit organizations, and other funding agencies are increasingly demanding information on how program funds have been used and what funded programs have produced. Both program advocates and fiscal conservatives need information on program results. Performance management (or managing for results) initiatives are involving increasing numbers of program managers and staff in developing performance goals, monitoring performance, and then reporting on performance to inform decision making. The public is also becoming more demanding about how their tax dollars and fees are being used.

National governments, such as those in the United States, Australia, Canada, Chile, France, Mexico, Peru, the Scandinavian countries, and the United Kingdom, have developed experience with and expertise in program evaluations, including *performance audits*, also known as *value-for-money* audits. In the United States, the Government Performance and Results Act of 1993 requires federal agencies to develop and update strategic plans, to establish annual performance targets, and to report annually on program performance. The Chief Financial Officers Act of 1990 requires federal agencies to provide a list of their program evaluations as well as to provide “systematic measurement of performance” and information on the “results of operations.” The World Bank and other multilateral and regional banks have been pressing for evaluations of the work for which they provide support.

Handbook Organization

This handbook is divided into four parts. These address evaluation planning and design, data collection, data analysis, and evaluation use. In Part One, the authors of Chapters One through Ten explore a variety of approaches to planning and

designing evaluation studies and performance monitoring systems. Evaluation planning and design should ensure that the benefits of evaluation outweigh its costs. The chapters in Part One provide an overview of program evaluation; suggest strategies for involving intended users and other key stakeholders in evaluation planning and design; and discuss the use of logic models, evaluability assessment and other exploratory evaluation approaches, performance measurement systems, case studies, and various experimental and quasi-experimental designs. The evaluation designs presented provide information on program activities and outputs, on program outcomes, and on the extent to which program activities have caused program results. Chapter authors discuss the purpose of each evaluation design, the types of questions that can be answered, and requirements that must be met to use each design properly. In addition, Part One contains chapters on recruitment and retention of evaluation study participants and on multisite evaluations.

In Part Two, the authors of Chapters Eleven through Eighteen describe practical data collection procedures, that is, methods for collecting data on program performance within tight time and resource constraints. They describe both well-established and newer procedures for collecting information on program performance, including the use of agency records, surveys, ratings by trained observers, the Internet, focus groups, and semi-structured interviewing and the collection of data in the field and of “stories” for evaluation studies. They discuss uses of these data collection procedures in program evaluations and indicate the types of quality control needed to ensure that the resulting data are valid and reliable.

In Part Three, the authors of Chapters Nineteen to Twenty-Two provide advice on important methods for data analysis, looking at methods for analyzing qualitative data, use of appropriate statistics and statistical tests, cost-effectiveness and cost-benefit analysis, and meta-analyses and evaluation syntheses. They discuss the requirements that must be met to use these data analysis techniques and present examples illustrating their application.

In Part Four, the authors of Chapters Twenty-Three to Twenty-Eight describe methods for getting evaluation results used. They offer advice on avoiding evaluation pitfalls, developing options and recommendations for policy and program change, reporting findings persuasively, contracting for evaluations, and overcoming political and bureaucratic challenges to the use of evaluation findings. The final chapter discusses challenges and issues in evaluation, including quality control of the evaluation process, selection and training of evaluators, and evaluation standards and ethics, and it also examines the relationships between performance monitoring systems and evaluation studies. This chapter—and the handbook—closes with a discussion of current and future trends in program evaluation.

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Consulting Editor
Public Management and Administration
James L. Perry
Indiana University

THE EDITORS

JOSEPH S. WHOLEY is professor emeritus, University of Southern California, School of Policy, Planning, and Development. His work focuses on the use of strategic planning, performance management, and program evaluation to improve the performance and accountability of public and nonprofit organizations. Wholey is the author or coauthor of numerous journal articles and five books, including *Evaluation and Effective Public Management* (1983) and *Improving Government Performance* (with Kathryn Newcomer, 1989) and is coeditor of three books, including *Handbook of Practical Program Evaluation* (1994, 2004, 2010) and *Performance and Credibility* (with Mark Abramson and Christopher Bellavita, 1986). He has consulted with and provided training for the World Bank and a wide variety of government agencies, nonprofit organizations, and foundations in this country and abroad. He has served as president of the Evaluation Research Society and is a cofounder of the American Evaluation Association.

Wholey has served as special assistant to the deputy assistant secretary for program analysis and director of evaluation in the U.S. Department of Health, Education, and Welfare; director of evaluation studies at the Urban Institute; deputy assistant secretary for planning and evaluation in the U.S. Department of Health and Human Services; senior advisor to the deputy director for management in the White House Office of Management and Budget; and senior advisor for evaluation methodology and senior advisor for performance and accountability in the U.S. Government Accountability Office.

Wholey is a Fellow of the National Academy of Public Administration. In 1979 he received the Gunnar and Alva Myrdal Prize from the Evaluation Research Society, and in 1983 he received the Elmer B. Staats Award from the National Capital Area chapter of the American Society for Public Administration. In 1999 the Center for Accountability and Performance of the American Society for Public Administration presented him with a lifetime achievement award for a lifetime of outstanding scholarship in performance measurement and performance management and established the Joseph S. Wholey Distinguished Scholarship Award.

Wholey held elective office for eight years as a member of the County Board of Arlington, Virginia, serving three times as chairman. He chaired Arlington's Long-Range County Improvement Program, which stimulated high-density development that locates high-rise office buildings, shops, apartments, condominiums, and hotels close to subway stops. He also chaired the Washington Metropolitan Area Transit Authority, the Virginia Board of Social Services, and the International Hospice Institute. He was president of Hospice of Northern Virginia and president of the Arlington Partnership for Affordable Housing. He is a cofounder and board member of the Alliance for Housing Solutions.

Wholey holds an MA degree in mathematics and a PhD degree in philosophy from Harvard University and a BA degree in mathematics from The Catholic University of America.

HARRY P. HATRY is a Distinguished Fellow and director of the Public Management Program at the Urban Institute in Washington, D.C. He received his BS degree in engineering from Yale University and his MS degree from Columbia University's Graduate School of Business. He is a principal author of *Performance Measurement: Getting Results* (second edition, 2006), *How Effective Are Your Community Services? Procedures for Measuring Their Quality* (third edition, 2006), the *Legislating for Results* series of municipal action guides (2008), *Making Results-Based State Government Work* (2001), *Practical Program Evaluation for State and Local Government* (second edition, 1981), and an editor and author of the six-volume series *Outcome Management for Nonprofit Organizations* (2004).

He has been a national leader in developing performance measurement and evaluation procedures for public agencies at all three levels of government since the 1970s. He has led a number of efforts by public and nonprofit organizations to develop outcome measurement procedures for a number of public services.

Hatry is a Fellow of the National Academy of Public Administration. He was a member of the U.S. Department of Education's Evaluation Review Panel and a member of the White House Office of Management and Budget's Performance Measurement Advisory Council, 2002–2003. He received the 1985 Elmer B. Staats Award for Excellence in Program Evaluation and a 1984

American Society for Public Administration award naming him Outstanding Contributor to the Literature of Management Science and Policy Science. In 1993, he received a National Public Service Award from the American Society for Public Administration and National Academy of Public Administration. In 1996, he received the Evaluator of the Year award from the Washington Evaluators Association. In 1999, the Center for Accountability and Performance of the American Society of Public Administration presented him with a lifetime achievement award for his work in performance measurement and established the Harry Hatry Award for Distinguished Practice in Performance Measurement. In 2000, he received a 50th Anniversary Einhorn-Gary award from the Association of Government Accountants for “sustained commitment to advancing government accountability.”

KATHRYN E. NEWCOMER is the director of the Trachtenberg School of Public Policy and Public Administration at The George Washington University, where she is also the codirector of the Midge Smith Center for Evaluation Effectiveness, home of The Evaluators’ Institute (TEI). She teaches public and nonprofit program evaluation, research design, and applied statistics. She routinely conducts research and training for federal and local government agencies and nonprofit organizations on performance measurement and program evaluation and has designed and conducted evaluations for several U.S. federal agencies and dozens of nonprofit organizations.

Newcomer has co-edited three books in addition to previous editions of this handbook: *Improving Government Performance* (1989), *Meeting the Challenges of Performance-Oriented Government* (2002), *Getting Results: A Guide for Federal Leaders and Managers* (2005), and co-authored (with James Kee) *Transformational Leadership: Leading Change in Public and Nonprofit Agencies* (June 2008). She is also the editor of a volume of New Directions for Public Program Evaluation, *Using Performance Measurement to Improve Public and Nonprofit Programs* (1997), and of numerous articles in journals, including the *Public Administration Review*. She is a Fellow of the National Academy of Public Administration and currently serves on the Comptroller General’s Educators’ Advisory Panel. She served as president of the National Association of Schools of Public Affairs and Administration (NASPAA) in 2006–2007. She has received two Fulbright awards, one for Taiwan (1993) and one for Egypt (2001–2004). In 2008, she received the Elmer Staats Award for Achievements in Government Accountability, awarded by the National Capital Area Chapter of the American Society for Public Administration. She has lectured on performance measurement and public program evaluation in Ukraine, Brazil, Egypt, Taiwan, Colombia, Nicaragua, and the U.K.

Newcomer earned a BS degree in education and an MA degree in political science from the University of Kansas and her PhD degree in political science from the University of Iowa.

THE CONTRIBUTORS

WILLIAM C. ADAMS is professor of public policy and public administration at the Trachtenberg School of Public Policy and Public Administration at The George Washington University. He earned his BA and MA degrees in political science from Baylor University and his PhD degree in political science from George Washington University, while working in the Washington office of the Rand Corporation, where he coauthored *An Assessment of Telephone Survey Methods*. His most recent book is *Election Night News and Voter Turnout: Solving the Projection Puzzle*. Other books that he has authored or edited are *Television Coverage of the 1980 Presidential Campaign*, *Television Coverage of International Affairs*, *Television Coverage of the Middle East*, and *Television Network News: Issues in Content Research*. His scholarly studies have been published in journals such as *Policy Studies Journal*, *Public Opinion Quarterly*, *Journal of Politics*, *Public Administration Review*, and *The Public Manager*. Adams has traveled extensively in more than 120 countries and lectured at many universities abroad, and was a Fulbright Fellow in 2010 at the University of Malaya, Kuala Lumpur.

JAMES B. BELL is the president of James Bell Associates, a firm that specializes in national evaluations of innovations in health and human services programs, such as the first Medicaid managed care demonstrations in the early 1980s. In recent years he has focused on evaluating the clinical outcomes and costs of integrated services for persons living with HIV/AIDS and co-occurring mental health and substance use disorders. Bell also oversees an evaluation of innovations in the

management of patient safety and medical liability risk, as well as an evaluation of a promising child maltreatment prevention program. From 1974 to 1979, Bell worked with Joseph Wholey and other members of the Urban Institute's Program Evaluation Studies Group to develop evaluability assessment and other approaches to planning useful evaluations of federal programs. He received a BA degree in political science from the University of California, Los Angeles and an MA degree in political science from California State University at Northridge.

ROBERT F. BORUCH is University Trustee Chair Professor in the Graduate School of Education, the Statistics Department of the Wharton School, and the Fels Center for Government, all at the University of Pennsylvania. He is a recipient of the American Evaluation Association's Myrdal Prize and the Policy Studies Organization's D. T. Campbell Award. He is a Fellow of the American Statistical Association and the American Academy of Arts and Sciences and has been a Fellow at the Center for Advanced Study in the Behavioral Sciences and the Rockefeller Foundation's Bellagio Center. His most recent books are *Randomized Experiments for Planning and Evaluation* and *Evidence Matters: Randomized Trials in Education Research* (with coeditor Frederick Mosteller). He is a member of the boards of directors of the W. T. Grant Foundation and the American Institutes for Research, cochairs the Campbell Collaboration Steering Group, and serves as principal investigator for the What Works Clearinghouse of the U.S. Department of Education's Institute for Education Sciences. He earned his BE from the Stevens Institute of Technology and his PhD from Iowa State University.

JULIE BRENNAN is adjunct instructor at the University of North Carolina at Chapel Hill's School of Government. She recently retired from the position of director of strategic initiatives for the City of Durham, North Carolina, where she helped to create that city's Results Based Accountability program. Prior to holding that city position, she served as Durham's assistant city manager and as director of budget and management services and prior to that she served the City and County of San Francisco as director of planning and budget with the Department of Human Services and as budget/policy analyst in the Office of the Mayor. She is a member of the International City/County Management Association and a credentialed manager and has served on the board of directors of the North Carolina Local Government Budget Association. She has a BA degree in political science from the University of California, Berkeley and an MPP degree from the John F. Kennedy School of Government at Harvard University.

KEESHAWNA S. BROOKS is currently a survey director in the Public Health Department at the National Opinion Research Center (NORC). Her work focuses primarily on questionnaire design and data analysis for large-scale public health surveys and on comprehensive planning and execution of survey data collection and data delivery. She has worked on the Centers for Disease Control and

Prevention–sponsored National Immunization Survey and the State and Local Integrated Telephone Survey and has served as the data collection task leader for the CDC’s community-based public health project Racial and Ethnic Approaches to Community Health Across the U.S. She also presented methodological recommendations for the National Program Office of the Robert Wood Johnson Foundation–sponsored project Finding Answers: Disparities Research for Change. She has also shared results of analytical and methodological research at several annual conferences of the American Association of Public Opinion Research. Prior to joining NORC, she gained a wealth of research experience during her undergraduate years at the University of Chicago as a research assistant in the Goldin-Meadow Laboratory. After receiving a BA degree in psychology, she went on to receive an MA degree in social science from the University of Chicago.

JOHN M. BRYSON is McKnight Presidential Professor of Planning and Public Affairs at the Hubert H. Humphrey Institute of Public Affairs at the University of Minnesota. He is best known for his books *Strategic Planning for Public and Nonprofit Organizations* (third edition, 2004) and *Leadership for the Common Good* (with Barbara C. Crosby, second edition, 2005). He is the recipient of many awards for his work, including the Charles H. Levine Award for Excellence in Public Administration from the American Society of Public Administration and the National Association of Schools of Public Affairs and Administration, and is a Fellow of the National Academy of Public Administration. He has a BA degree in economics from Cornell University, along with three degrees from the University of Wisconsin-Madison: an MA degree in public policy and administration and MS and PhD degrees in urban and regional planning.

MARY ANNE CASEY is an independent consultant to government agencies and nonprofit organizations. She helps them design and conduct individual and group interviews as a way of listening to their employees and customers. The resulting information is typically used to plan and evaluate programs. She previously worked for the Kellogg Foundation, the University of Minnesota, and the State of Minnesota. Casey is the coauthor of several books on focus group interviewing. She has been a consultant and evaluator at the international, national, state, and local levels on topics relating to health, wellness, community development, agricultural policy, and environmental issues. She received her PhD degree from the University of Minnesota. She travels extensively throughout the United States and the world.

STEPHANIE RIEGG CELLINI is assistant professor of public policy and public administration and of economics at The George Washington University. Her research interests include education policy, labor economics, and public finance. Her recent papers focus on vocational education, two-year colleges, and education finance in both the K–12 and postsecondary systems. Her work has been

published in the *Quarterly Journal of Economics*, the *Journal of Policy Analysis and Management*, and the *American Economic Journal: Economic Policy*, among others. She teaches cost-benefit analysis and economics for public decision making at George Washington University as well as training seminars in cost-benefit analysis for The Evaluators' Institute. She received her MA and PhD degrees in economics from the University of California, Los Angeles and her BA degree in public policy from Stanford University.

BARBARA J. COHN BERMAN, vice president of the Fund for the City of New York and its sister organization, the National Center for Civic Innovation, is the founding director of the Center on Government Performance, which serves both organizations. Her work has brought the public's perspective to government performance measurement, reporting, and management. She is the author of *Listening to the Public: Adding the Voices of the People to Government Performance Measurement and Reporting*, two volumes of *How Smooth Are New York City's Streets?*, various articles and guides, and was guest editor of the Spring 2008 issue of the *National Civic Review*. ComNET, described in her chapter in this volume, was one of several programs launched by her center. She has worked in government; has been a consultant to business, nonprofits, and government; and has taught graduate courses in public management and policy analysis. As a postgraduate, she was a Loeb Fellow at Harvard University.

DYLAN CONGER is assistant professor in the Trachtenberg School of Public Policy and Public Administration at The George Washington University, where she teaches courses in research methods, econometrics, and policy analysis. Her research concerns disadvantaged and minority youths, with a focus on education policies and urban areas. Her most recent articles have focused on understanding the drivers of racial, socioeconomic, and gender disparities in high school course taking (*Journal of Policy Analysis and Management*, 2009), the effect of age of migration on immigrant students' outcomes (*Journal of Urban Economics*, 2009), gender differences in college performance (*The Annals of the American Academy of Political and Social Science*, 2010), and the effect of bilingual education programs on students' English ability (*Social Science Quarterly*, forthcoming). Before joining the faculty of the Trachtenberg School, she held research and consulting positions for a number of organizations, including the Vera Institute of Justice, Abt Associates, Inc., the Annie E. Casey Foundation, and the Greater Boston Housing and Shelter Alliance. She received her BA degree in ethnic studies from the University of California, Berkeley, her MPP degree from the University of Michigan, and her PhD degree in public policy and public administration from New York University.

SCOTT C COOK is a clinical psychologist with extensive experience in serving diverse rural and inner-city populations with multiple medical, social,

and economic challenges. He is deputy director of the Robert Wood Johnson Foundation's *Finding Answers: Disparities Research for Change*, National Program Office, a major effort to reduce racial and ethnic disparities in health care. Cook joined the team at the University of Chicago after eight years in clinical and leadership roles in research and community services at Howard Brown Health Center, a clinic that serves the diverse gay, lesbian, bisexual, and transgender communities in Chicago. He received his master's and doctoral degrees from the University of Missouri at Columbia. He completed his internship at Cook County Hospital (now John H. Stroger, Jr. Hospital), the major public hospital in Chicago serving an indigent, multiethnic population. Over a three-year period he consulted with the public health department of Zhejiang Province, China, to help design and implement HIV and STD risk reduction, testing, counseling, and treatment services for at-risk populations in the cities of Hangzhou, Wenzhou, and Ningbo.

SHARA GODIWALLA is a senior survey director with more than sixteen years of experience in the field of survey research and project management with academia and with nonprofit, government, and international organizations. Her expertise lies in survey management, public health, children's health, health disparities, and international health. She currently serves as associate project director with the National Opinion Research Center at the University of Chicago for the National Children's Study, a survey that follows children from before birth to twenty-one years of age. Prior to this, she was based at the Centers for Disease Control and Prevention and worked with twenty-two federal agencies as the director of the Federal Interagency Forum on Child and Family Statistics, which publishes national reports on children and families. She received her BA degree in biochemistry from the University of Texas at Austin and her MPH degree from The Johns Hopkins University.

DELWYN GOODRICK is a consultant in evaluation and organizational development and works with both government and nongovernment clients. She delivers professional development in qualitative and mixed-method evaluation and research methods in Australia, New Zealand, Singapore, and the United Kingdom and is on the faculty of The Evaluators' Institute at George Washington University. She previously held academic appointments at Victoria University and the Royal Melbourne Institute of Technology and led the development of an evaluation support unit within the Victoria Department of Human Services while working in a policy role. She has undertaken evaluations of a range of public sector initiatives in health and education, including initiatives in communities of practice, leadership, and adult learning. She earned her BA (honors) and master's degrees in psychology and education from the University of Waikato, New Zealand, and her PhD degree,

with a specialization in evaluation, from the University of Melbourne. She is coeditor of the *Evaluation Journal of Australasia*.

GEORGE F. GROB is president, Center for Public Program Evaluation, an evaluation company specializing in public policy, strategic planning, and communications. Prior to forming this independent evaluation consultancy, George was deputy inspector general for evaluation and inspections at the U.S. Department of Health and Human Services. Before retiring from federal service, he was Executive Director of the Citizens' Healthcare Working Group, a congressionally established commission charged with developing options for health care reform based on citizen input at community meetings and open-ended Web polling. His work has centered on policy development and program effectiveness, largely in the fields of health, human services, and the environment. Grob earned his BA degree in philosophy from Kilroe Seminary of the Sacred Heart and his MA degree in mathematics from Georgetown University.

GARY T. HENRY holds the Duncan MacRae '09 and Rebecca Kyle MacRae Professorship of Public Policy in the Department of Public Policy, directs the Carolina Institute for Public Policy, and serves as senior statistician at the University of North Carolina at Chapel Hill. Henry has evaluated a variety of policies and programs, including North Carolina's Disadvantaged Student Supplemental Fund, Georgia's Universal Pre-K, public information campaigns, and the HOPE Scholarship, as well as school reforms and accountability systems. He is the author of *Practical Sampling* (1990) and *Graphing Data* (1995) and coauthor of *Evaluation: An Integrated Framework for Understanding, Guiding, and Improving Policies and Programs* (2000). He received the Outstanding Evaluation of the Year Award from the American Evaluation Association in 1998 and, along with Steve Harkreader, the Joseph S. Wholey Distinguished Scholarship Award from the American Society for Public Administration and the Center for Accountability and Performance in 2001.

PRIYA JOHN is a research project professional for the University of Chicago Diabetes Research and Training Center. Her work includes overseeing projects that use decision analysis and epidemiological methods to characterize elderly patients with diabetes. Additionally, she works on a trial that looks at the integration of health information technology and decision analysis and its ability to help physicians and patients with treatment goals. She also assists with the Robert Wood Johnson Foundation's National Program Office for Finding Answers: Disparities Research for Change, a project that aims to reduce racial and ethnic disparities in health care. Prior to working at the University of Chicago, she worked on a trial using personal digital assistants as a weight management tracking device for veterans. She has also done extensive work in the area of health policy and its effects on obesity. She received her BS degree in health sciences from Purdue University and her MPH degree from Indiana University, Bloomington.

GRETCHEN B. JORDAN is a principal member of technical staff with Sandia National Laboratories, working with the Sandia Science and Engineering Strategic Management Unit, the U.S. Department of Energy (DOE) Office of Energy Efficiency and Renewable Energy, and the DOE Office of Science on evaluation and performance measurement and innovative methods of assessing the effectiveness of research organizations. She is the North American editor of *Research Evaluation*, a Fellow of the American Association for the Advancement of Science, and founder and past chair of the American Evaluation Association's Topical Interest Group on Research, Technology, and Development Evaluation. Prior to joining Sandia in 1991, she was chairman of the Business Administration Department at the College of Santa Fe and a staff member for U.S. Senator Pete V. Domenici and the Senate Budget Committee. Jordan earned her PhD degree in economics from the University of New Mexico.

JAMES EDWIN KEE is a professor of public policy and public administration in the School of Public Policy and Public Administration at The George Washington University. He holds MPA and JD degrees from New York University and a BA degree from the University of Notre Dame. Kee joined George Washington in 1985, after seventeen years in policy and management positions in government, including serving as counsel to the New York State Assembly and as budget director and executive director of finance and administration for the State of Utah. His research and teaching areas include public finance, intergovernment relations, public management, privatization, and leadership. He has published in *Public Administration Review*, *Harvard Law Review*, and *Public Budgeting and Finance*. He is the author of *Out of Balance* (with former Utah governor Scott M. Matheson) and *Transforming Public and Nonprofit Organizations: Stewardship for Leading Change* (with Kathryn Newcomer). His consulting has included work with the Chinese Ministry of Finance, the U.S. Department of Energy, the National Governors Association, the World Bank, and the Inter-American Development Bank. He also conducts training sessions on cost-benefit analysis and leadership.

RICHARD A. KRUEGER is professor emeritus and Senior Fellow at the University of Minnesota. He teaches qualitative research methods and program evaluation in education, public health, and epidemiology. Although trained as a quantitative researcher, he was drawn to qualitative research and has spent the past thirty years learning about, practicing, and teaching qualitative research. Krueger is the author of a number of books on focus group interviewing. He is a past president of the American Evaluation Association. He has served as a consultant to organizations at the international, national, state, and local levels. Krueger holds an MA degree in public affairs from the University of Minnesota and a PhD degree in evaluation studies, also from the University of Minnesota.