

# Gerald Halpern, PhD

## Curriculum Vitae

Dr. Gerald Halpern was among the first to pursue formal academic training in program evaluation. With more than 40 years of active practical experience and of university and private teaching, Gerald is a highly experienced program evaluator with particular interest in program improvement, attribution studies and cost-effectiveness studies.

Dr. Halpern prefers to operate at the strategic program level. He brings extensive experience both as a Senior Advisor to Executive Managers and as a manager of work groups in evaluation and in value-for-money auditing. He plans and directs program of evaluation studies and statistical studies; he both undertakes studies of a complex nature and serves as a quality control expert for the studies of others. He has developed and managed research and evaluation units in the education sector, in the federal government and in the private sector.

Gerald is a recognized expert in the management and conduct of evaluation; he has extensive experience in overall planning, development and implementation of studies ranging from strategic programs in federal departments, program continuation studies for major non-federal programs as well as performance improvement in the for-profit sector. Studies include performance measurement, program evaluation, statistical surveys and special studies. On the one hand, this requires the coordination of teams of specialized experts to perform evaluation tasks; on the other hand, it requires interaction with governing bodies to provide advice and direct inputs to policy formulation. His summative evaluations have addressed the issues of program attribution (cause and effect) and typically include the understanding of existing theory and its modification as required in forward directed studies. The use of new applications of existing methods and techniques has required the monitoring of theory and practice developments in evaluation both nationally and internationally.

In addition to managing large and complex studies, Gerald Halpern teaches, at the graduate level on a session basis, the planning, conduct and reporting of complex studies. He frequently attends and delivers technical papers at national and international meetings. He has served as a senior advisor to the Canadian Evaluation Society including several years of service as Chair for professional development issues.

### **PROFESSIONAL PREFERENCES**

Dr. Halpern brings the depth and the breadth of experience that provides a departmental evaluation function with

- administration and/or conduct of evaluation studies that fully satisfy professional requisites and Treasury Board requirements
- collegial review of
  - evaluation plans at project initiation
  - evaluation report at end of project
  - program theory models at any time including review for program improvement conducted without an empirical evaluation study
- mentoring on a one-to-one sustained basis
- teaching on site - topics to be selected from a wide range of options

**EDUCATION**

Ph.D. Western Reserve University, Industrial Psychology

M.Sc. Western Reserve University, Psychology

BA McGill University, Anthropology and Sociology

**PROFILE**

➤ University Lecturer

Currently, he teaches a graduate level course (Advanced Design for Evaluation Studies) at the School of Social Policy and Administration, Carleton University. Over the years, he has also taught at the University of Ottawa, Simon Fraser University and Rutgers University.

➤ Private Practice Consultant - 1995 - to 2008

- Consultant in program and policy evaluation; performance measurement; performance enhancement; social science research; survey design, implementation and analysis.
- Responsible for a number of challenging assignments including summative evaluations of the Canadian Breast Cancer Research Alliance, the Regional Partnerships Program of the Canadian Institutes of Health Research, and an evolutionary analysis to improve product for the Ebonite Corporation. Full list of engagements available upon request.

➤ Director, Effectiveness Group, Office of the Auditor General of Canada, 1985 to 1995

- Oversight auditing of the evaluation function as practiced in government departments.
- Value-For-Money auditor at a number of departments and agencies including Atomic Energy Control Board; Library of Parliament; Supply and Services Canada; Environment Canada; National Arts Centre; Employment Program; Search and Rescue; Office of the Comptroller General.
- Theory and practice of effectiveness measurement, meta-evaluation, efficiency measurement, performance measurement and evaluation.
- Government-wide monitoring of the quality of evaluation reports from federal departments and agencies.
- Includes a two year posting, working in French, with the Bureau du vérificateur général du Québec - septembre 1989-août 1991 – où il a rempli les fonctions d'un expert conseil à l'interne spécialisé dans l'approche de la vérification des résultats ainsi qu'en guise de membre des équipes chargées de la vérification du Ministère.

➤ Program Evaluation, Department of the Secretary of State of Canada.

- Director, Evaluation - 1980-1985
- Senior Advisor, Research and Evaluation - 1976-1980
- Institution of a program evaluation unit: staffing; procedures; guidebooks; management of periodic evaluation studies; ongoing evaluation advice to the Senior Management Committee.
- Federal-provincial relations; statistical and research advice on feasibility and cost issues in program evaluation; statistical analysis.

- Director of Research, Ottawa Board of Education, 1967-1976
  - Developed and managed a professional staff of educational researchers responsible for the creation of a system-wide diagnostic and evaluative testing program, the assessment of ongoing school programs, the evaluation of experimental and/or pilot programs and the provision of advice to the senior administrators and the Board on program cost-effectiveness. The program was largely funded by competitively earned research grants.
- Associate Research Psychologist (1964-1966) to Research Psychologist (1966-1967), Educational Testing Service. Princeton, New Jersey
  - Psychometric research including the development of personality measures and checklists; evaluation of user acceptance of materials
  - Consulting services to school districts.

#### **CONTRIBUTIONS TO PROFESSIONAL EVALUATION**

- Member of the executive of the National Capital Chapter of the Canadian Evaluation Society (CES) from 1999 - 2007.
- Executive member of the National Council of CES from 2001 -2005; chair of the Professional Development Committee from 2002-2005
- Headed a consortium of senior evaluators mandated to design the CES action plan for professional designations, 2005-2007.
- Member of the Association of Educational Researchers of Ontario (AERO), 1970-1976, including two years as President.
- Member since 1969, American Evaluation Association, with active participation in Consultants in Independent Practice special interest group.
- Recipient of several awards from CES and from AERO. List available upon request.

#### **LANGUAGES**

- English; French

#### **SELECTED PUBLICATIONS**

- Halpern, G. et al, *School Programs for French Language Learning*, Ottawa: The University of Ottawa Press, 1976
- Short selection of papers and presentations in refereed sources. Full list is available on request.
  - From Hubris to Reality: Evaluating Innovative Programs in Public Institutions*, Innovation Journal, Ottawa, 1998
  - Logic Models in Applied Evaluation*, Social Sciences and Humanities Research Council of Canada & Economic and Research Council, United Kingdom SSHRC & ESRC International Conference, Ottawa, 1994
  - Effectiveness Measurement: Theory, Application & Monitoring*, Evaluation, Social Science and Public Policy Ottawa, 1993
  - Evaluating Program Evaluation: An Auditor's Perspective* American Evaluation Association, November 1993 Dallas, Texas

*Model for Evaluating Government Interventions* American Evaluation Association, November 1993 Dallas, Texas.

- This list of publications does not include reports written while at various employers or reports prepared for consulting assignments.

**RECENT STUDIES MANAGED BY GERALD HALPERN, FAIR FINDINGS INCORPORATED**

- Standing Offer. Government of Ontario – all departments
- Standing Offer. Department of Canadian Heritage - Canada
- Standing Offer. Royal Canadian Mounted Police
- Formative Evaluation. Knowledge Development and Exchange. Public Health Agency of Canada
- Summative Evaluation. Arts Presentation Canada. Canadian Heritage
- Evaluation Design Report for the Strategic Training Initiative in Health Research. Canadian Institutes of Health Research
- Evaluation of Best Practices for Protecting Privacy in Health Research Canadian Institutes of Health Research
- Evolutionary analysis to guide new product design. Ebonite Corporation
- Summative Evaluation. Regional Partnerships Program. Canadian Institutes of Health Research
- Summative Evaluation. Canadian Breast Cancer Research Alliance. CBCRA Board
- Assessment of the on-line interactive Directory of Canadian Search and Rescue Organizations. National Search and Rescue Secretariat
- Corporate Service A-Base Review. Fisheries and Oceans Canada
- Models for Corporate Services Delivery System. Fisheries and Oceans Canada
- Canada-Ontario Promotion of Official Languages Evaluation. Office of Francophone Affairs - Ontario
- Evaluation of the National Diabetes Symposium. Health Canada
- Review of the Health Counsellor Position: Canadian Permanent Position-European Mission. Health Canada
- Review of International Co-operation HIV/AIDS. Health Canada
- Draft Writing of the new guidelines for Evaluation and Accountability Frameworks. Treasury Board Secretariat
- Mid-term performance, United Nations System Strategic Plan. UN AIDS, Geneva
- Communications Research Centre Intellectual Property Awards Program Framework. Industry Canada
- Analysis of the Net Economic Impact of Communities Hosting Highly Skilled Temporary Foreign Workers. Industry Canada
- Research Supply Program Evaluation. Central Mortgage and Housing Corporation
- Work Sharing Evaluation Case Studies. Human Resources Development Canada
- Temporary Foreign Worker Redesign - Evaluation Framework. Human Resources Development Canada

- Formative Evaluation of the Spousal Pilot Project. Human Resources Development Canada
- Audit Evaluation of nation-wide sectoral partnership arrangements. Human Resources Development Canada
- Monitoring and Control System: Design of a balanced report card approach to the forward development of procedures to enhance participatory democracy. CISA/CESO Government of Bolivia
- Client Satisfaction Surveys (annual – last five years). Ontario Ministry of Citizenship, Culture and Recreation
- Assessment of the Liaison Committee Structure. Canadian Blood Service
- Internal clients' satisfaction survey. Ontario Ministry of Citizenship, Culture and Recreation
- Move-morale survey. Ontario Ministry of Citizenship, Culture and Recreation
- Survey training courses. Ontario Ministry of Citizenship, Culture and Recreation
- Training Demand Survey. Canadian Trucking Human Resources Council
- Market Research Surveys/Advice. Canadian Trucking Human Resources Council
- Formative Evaluation - Canada's Citizenship Week. Citizenship and Immigration Canada
- Permanent Resident Card RMAF. Citizenship and Immigration Canada
- Spousal Work Permit RMAF. Citizenship and Immigration Canada
- Evaluation of Canada's Response to the Kosovo Refugee Crisis. Citizenship and Immigration Canada
- Program Evaluation - Spousal Pilot Project. Citizenship and Immigration Canada
- Performance Monitoring Framework - Spousal Pilot Project
- Value-For-Money Audit Assignments. Auditor General of Canada
- Research study of BOOT/BOT International Practice. Auditor General of Canada
- Department of Foreign Affairs and International Trade
- Evaluation of the Canada Reception Centres. Department of Foreign Affairs
- Program Audit - French Accelerated French Language Training Program. Department of Foreign Affairs
- Evaluation of International Social Services. Department of Foreign Affairs
- Management and Accountability Frameworks. Department of Foreign Affairs
- Evaluation of the Arts and Cultural Industries program. Department of Foreign Affairs
- Evaluation of International Compensation Condition. Department of Foreign Affairs