

# Improving the Results Of Workshops

## Part 3 — Linkage, Evaluation and Follow-up

Leonard Nadler

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*Editor's Note: This is the third in a series of articles based on the forthcoming book, Improving Workshops and Conferences, by Leonard Nadler, to be published by Gulf Publishing in early 1977.*

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The workshop is over and the coordinator and staff breathe a sigh of relief! Emotionally and physically there is a letdown, yet this is one of the most crucial points of the entire workshop process. Now is the time for the payoff . . . the bottom line. If the workshop had clear objectives and was meant to produce changes in knowledge and/or behavior that would persist after the workshop, then, for the coordinator, the workshop has not yet reached its terminal point.

Just as the design committee had a great deal of work to do before the participants came to the site (see the first article in this series — May 1976), the coordinator has more to do to prepare for the participants' return home.

To close the loop, it would be helpful if the original design committee could now be reconvened to assess their planning, review what happened during the conduct of the workshop, and make suggestions for future improvements. Theoretically, this is desirable, but realistically, very few workshop budgets provide for bringing the design committee back together again. Therefore, the coordinator and design committee need to build the linkage during the planning stage, and the coordinator and the steering committee

have to be sure it takes place during the conduct of the workshop.

### Linkage

There are different kinds of exercises which have been developed to provide the linkage. One which I have found extremely successful is the "memo to myself." Described very briefly, toward the end of the workshop, the participants are given a few minutes to write a brief memo, indicating specifically what they will do as a result of having been at this particular workshop. This is done with a carbonized sheet, making an original and two copies, with distribution as follows:

Page 1 - retained by the participant with other workshop materials

Page 2 - collected by the coordinator

Page 3 - inserted by the participant into a self-addressed envelope

*Page 1* - As it is comingled with the other workshop materials, it is probable that little will be done with it. When participants return from the workshop to their regular world, they usually have to devote considerable time to answering phone messages, catching up on correspondence, and reintegrating into their organizations, families and communities. It may be weeks or months before they look at the workshop materials again, if ever. At some later time, while sorting through those materials, they may stumble upon Page 1 and have a reminder of what they had planned to do as a result of attending the workshop.

*Page 2* - will be collected by the coordinator for later analysis. The coordinator will be able to determine the kinds of actions participants plan on, as a result of having been at the workshop. These plans can be matched against the workshop objectives and the expectations of the sponsor.

The use of the first two pages may be familiar to the coordinator and the participants. *Page 3* is somewhat different. For this exercise, the coordinator should provide envelopes and instruct the participants to address the envelopes to themselves, either to their home or office. They then insert Page 3 into the envelope and seal it. This is then collected by the coordinator. At some later date, the coordinator will mail these to the participants. The specific date should be carefully considered and depends on a variety of factors. Will there be further contact with the participants? If so, should the Page 3 envelope come before or after that contact? What about an evaluation instrument (discussed below)? Should Page 3 be sent out before, with, or after the work-

shop evaluation instrument?

There are other exercises and experiences which are similar to this, and it is not being suggested that this is the only form of linkage possible. What is important is that linkage should be built in through some kind of observable activity before the workshop ends.

An anticipated outcome of a workshop may be that there will be new behavior on the part of the participant upon returning to the organization. It is obviously difficult and perhaps impossible for a participant to return from a workshop and to implement changed behavior when all the other people in the organization have not shared his or her experiences. This is part of what gave rise to the OD movement. There was great frustration when individuals who learned new behaviors in workshops were unable to use them when they returned to their organizations because the others had not been at the same or similar workshops.

It should not be expected that an individual who attended a workshop will return and be able to make massive changes in the organization. Some sponsors have tried to use the "critical mass" approach. That is, if enough people have been sent to a series of related workshops, after a while there will be a sufficient number of people with this experience who will be able to return and do something about changing the organization. This is not a realistic use of workshops. It is not the "critical mass" which brings about change, but particular individuals who are in positions of power.

During the linkage phase of the workshop, participants can explore how they will bring about change in their organizations. A useful exercise is to have them practice how they will report the workshop experience to those who should hear about it.

#### **Evaluation**

Every workshop should have

some kind of evaluation. It can range from a very simple "happiness quotient" to a very sophisticated documentation of actual changes back home. The former can take the form of "did you like this workshop?" Or it is even possible to structure it further by asking, "What did you like best about this workshop?" If the objective was to get the participants to like the workshop, these questions are legitimate. But liking an experience may have little or nothing to do with accomplishing the objectives.

Although every workshop should be evaluated, there must be a clear understanding why this particular workshop should be evaluated, and what is to be done with the results of the evaluation. As with other parts of the workshop, there must be clear planning. The coordinator should be able to respond to questions like:

- *With whom will the evaluation be shared?*
- *What is expected of those who received the evaluation results?*
- *Given those who will receive it, what form(s) should it take?*

There are many ways to evaluate. One is the interview, though this can be expensive as it requires qualified interviewers, and takes a lot of time. It also means that during the interview the participant is not able to take part in some other workshop activity. There are times, though, when the interview can evoke data which is not readily obtainable through any other technique.

More common is the questionnaire, which the participants can complete during the workshop. As with any questionnaire or evaluation form, the following are the minimal steps which should be followed:

1. Design the instrument
2. Test out the instrument by using it with a group similar

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- to those who will receive the instrument
3. Revise the instrument as needed
  4. Distribute the revised instrument.

To skip the first two steps is to risk complete disaster. If the instrument does not provide the information needed for the evaluation, or if it is too difficult for the participants to respond to, there will be a negative impact on the rate of return and on the validity of the responses. There is only one opportunity, no second chance. If it hinges upon the instrument, it is worth taking the extra steps (and time and money) to make sure the instrument does what it is supposed to do.

The next question is when to administer the instrument. If this is

done as one of the culminating activities of the workshop, the data will be much different than if the instrument is sent out after the end of the workshop. At the end of the workshop, there are several factors which can influence the way in which the participants will respond. If it has been a good workshop, participants may feel happy (halo effect). They will answer questions in a positive manner, at that particular time. In a five-day workshop, the participants may respond based on the event of the previous evening.

Let's assume that Friday is the last day, and that is the time the instrument is to be distributed. Perhaps the banquet was on Thursday evening. The data collected on Friday may reflect the feelings after the banquet rather

than anything else at the workshop. If the food was bad, the entertainment inappropriate, seating uncomfortable or the service poor, all of this will influence the participants' responses to the questionnaire on the following day. Yet the banquet may have been only a minor point to be evaluated, if it was to be evaluated at all.

Near the end of any workshop there is a period of psychological disengagement. The participants already have one foot on the airplane, or the key in their car's ignition. They are ready to leave and are gearing themselves up for that. The evaluation data they provide at this point may be superficial and misleading. Of course, there are those who, despite the banquet and psychological disengagement, will still provide good

data on the evaluation instrument.

Waiting until after the workshop to send out the instrument likewise presents problems. Once participants return home, they may be too busy to bother with anything related to the workshop. Once they get involved in activities which absorb all their time and attention, they may put off completing the instrument for several weeks, by which time the workshop will have lost its impact. They may be able to respond only to generalities, and not the specifics.

Obviously, there is no one best way or time to evaluate. The variety of possibilities should be weighed against the objectives as to why the evaluation is taking place, the nature of the participants, and what will be done with the data.

The coordinator must also consider whether to evaluate the workshop as a whole or whether to have an evaluation of individual sessions. The total workshop evaluation will be related to overall objectives. There are also good reasons for obtaining evaluations from the participants about the individual sessions. When outside resource persons have been used, it is important to develop a data bank concerning them. This will help the coordinator in staffing future workshops. A note of caution here . . . one must realize that feedback from participants may not be fully indicative of what really happened.

It is customary to ask participants to fill out an evaluation card at the end of each session, evaluating the content and the resource person who conducted the session. In one case, the resource person was evaluated as 3 on a scale of 4. The coordinator felt this was not good enough. He wanted all his resource persons to be rated as 4 by the participants. (This may not always be possible, for it is very seldom that participants will rate everybody as 4, as this could also indicate that they are not suffi-

ciently discriminating.) However, this was the first session of a two-week workshop, and there was no basis for comparison on which participants could judge (evaluate) this resource person.

If participants are to rate a resource person, is it in comparison to other resource people? If so, how can this be done when there have not yet been any other sessions? The evaluation must start sometime, and the coordinator does not want to lose feedback on the early resource people. The dilemma can be dealt with if the coordinator does not treat the participant feedback from the first days as being equal to that which follows.

At a major conference, I conducted a workshop session (as a resource person) early in the conference. The feedback at that time was quite good, but it got even better as time went on. Participants commented that "your session was great on Monday, but as the conference continued and I attended other sessions, I realized how much better yours was. The more sessions I attended, the better yours became. I wish I had that evaluation form back, I would mark it higher than I did then."

The coordinator must deal with the fact that there is no one perfect time to evaluate. If evaluation is held too early in the workshop, it may lose part of its validity. If done at the end of the workshop, the coordinator is faced with the problem of recency, in that those sessions which the participant may remember little of what actually happened. Therefore the evaluation should be done, with the full understanding of the various limitations, for it can still provide valuable data for the coordinator, the sponsor, and the design committee. Depending on how the evaluation is conducted and how the results are used, it can also provide valuable information for the participants, and therefore become an

additional learning experience for them.

### Follow-up

If the coordinator does evaluate (and this step is highly recommended) then something should be done with the results. The evaluation should not be done for cosmetic reasons — it looks good to have an evaluation. It should be done because there are specific reasons for evaluating.

The first use of the evaluation results can be for the sponsor. The conference may have been paid for by an employer, a government agency, or some organization which has funded the activity, and therefore, the coordinator has a responsibility for helping them understand what they got for their money. The evaluation may include items such as how many participants attended, and an analysis of the responses of the participants.

Participants may also want to know the results of the evaluation. Some will want to compare their perceptions and responses to those of others who attended the same conference. It may also be utilized for marketing purposes, for if the general feeling was that the workshop was helpful, then the next time the coordinator/sponsor offer a similar workshop, attendance would be encouraged.

Resource people appreciate feedback — at least, most of them do. Each resource person will react differently and will utilize the data in different ways. The coordinator need not be concerned with how the resource person uses the feedback, but does have a responsibility to make the information available. The most basic data is the result of a rating scale which indicates how participants saw the resource person in relation to the presentation, or as compared to others. This may not be as important as some individual comments, such as the ways in which the resource person was helpful to the

participants and the ways in which he or she could have been more helpful. The specifics are much more important than a set of numbers.

It may be physically and financially impossible to bring back together the design committee who did the initial work on the workshop. However, they can be sent a copy of the evaluation as well as indications as to how the original design was changed, and if possible, the reasons for the changes. This will help the design committee learn from the experience, which should be one of the benefits of serving on a design committee.

More important is the new design committee. If the same or a similar workshop is to be held again, a new design committee will be formed. It may involve some members of the old design committee, but there will be some deletions and some additions. There may be quite some time between the conclusion of one workshop and the convening of a new design committee to begin their work on another workshop. An overlap of people is desirable, but not always possible, but either way, one of the first pieces of data the new design committee should have is the design and evaluation of the previous workshop.

The evaluation should include feedback for the coordinator. If the coordinator is a professional who works with many workshops, continuous feedback can help him or her to maintain a balance. There is the danger that, after several success experiences, a coordinator can become professionally lethargic, which could result in less satisfactory workshops in the future. The coordinator should analyze the evaluation material in terms of how he might have made it a better workshop. One can also learn from success. From the data, the coordinator can determine those things that made the workshop successful, and which should be re-

peated in future experiences of this type.

The same data can be used in different ways depending upon the audience to which it will go. This is not unprofessional manipulation of data, but rather recognizes that different people have different needs. Therefore, to produce one generalized report from the evaluation data may result in an impressive document but one which is less valuable and less usable to different people.

There are other forms of follow-up which do not rely upon the evaluation. One technique I have found very helpful is the newsletter. If participants were expected to do something as a result of the workshop, they will be legitimately curious about what some of the other participants have actually done. A simple newsletter, sharing the results of the workshop does wonders to reinforce the possibility that everybody will at least try to use the workshop experiences back home. Out of the newsletter can come some additional ideas which were not expressed at the workshop, but are a direct result of the experience.

The newsletter can serve another function. After the workshop, participants may have new needs for information and resources which they did not anticipate during the workshop. The newsletter provides the sponsor with a mechanism for meeting this need. There are other follow-up activities, but space does not allow for more discussion here.

#### Conclusion

In this three-article series I have endeavored to share what I have learned through many years of serving as a coordinator, resource person, and participant as well as a member of many design committees. I find that there is no end to the learning process. Changes occur in our lifestyles, media availability, the pool of resource persons, and increased sophistication

on the part of the participants. Coordinators must face these realities or fall back on the boilerplate tactic of merely doing what they have always done, just changing the titles of the workshop and using different resource people. The coordinator is crucial to a good workshop and no matter how many times he or she has had the responsibility for a workshop, it is always possible to make the next one better. **USEASTD**

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