

High-Quality Evaluation

A thorough evaluation process produces better training programs and dollars saved for your department.

By LYNNE A. TYSON and HERMAN BIRNBRAUER

Evaluation must be carried out through the entire life of any program development. Immediately after the objectives are established and evaluation criteria are identified, the evaluation process must feed back into the design model at each stage. The results of your evaluations should be used to validate identified needs and objectives, and to revise design of materials, training strategies and programs and, finally, to revalidate results to the organization.

The human resource department should focus constantly on effective evaluation. Good evaluation is a timely, consistent and accurate process that upgrades and improves the quality of the services and the results of those services—if everyone involved gives total commitment. You can control the quality of your evaluations by following these steps: evaluation charter; evaluator selection process defined; evaluator role defined; evaluation methods and procedures defined; orientation and training of evaluator, manager and trainer.

Evaluation functions as a system of quality control for training and HRD. The process demands professional evaluators proficient in all phases of HRD who can work effectively with all involved—from program designers and trainers to trainees and clients.

Mission statement

The evaluation charter contains the input and agreement of all concerned, and a mission statement that clarifies the business of the organization and how this ef-

fort supports and contributes. Five other facets of the evaluation charter should be: a statement of the objectives; the needs and benefits of this effort; policies, procedures and methodologies outlines; responsibilities and accountabilities assigned; and a statement of standards to be attained throughout the evaluation process.

This charter, developed and worked through by all involved in the evaluation process, will ensure commitment to working in the same direction, using the same criteria and measurements, using a positive and developmental approach and creating a quality team effort.

Evaluators should address one critical issue when setting out to determine their roles, charter, function and image: support and improvement from a positive posture. Although they are a support group for improvement, they are not critiquers or rejectors. Evaluators must have a clear definition and methodology of their roles and functions—the what and how of their missions. Evaluators must address, up front, the perceptions of their trainees and clients. These perceptions might not be factual or accurate, but they are real; they are what the individuals believe them to be. Evaluators must strive to attain and maintain a positive, supportive and developmental image: How can I help? What do you need? How can we make this better?

As the process proceeds, each of its phases should be assessed. This provides continuous suggestions and feedback in a sequential developmental manner. Ideally, evaluators work at each step of the process, with all involved parties. If this is not possible, the program should be evaluated prior to its pilot or trial-run. The pilot allows testing of the program and its contents to ensure standards and program objectives are attained. Act on feedback as soon as possible.

Selection

When selecting evaluators, two criteria are of equal importance: skills in all phases of the HRD process; and qualified systems experts and objective assessors. Selecting subject matter experts and training them in evaluation techniques is the easier of the two. A third option, when all the skills are not available internally, is bringing in outside professional evaluators. Whatever option you select, you need background, knowledge, experience and the recognition and acceptance by your organization to get the job done.

Many systems include a checklist to eliminate omission and duplication and record assessments. These feedback instruments are then received and discussed with appropriate HRD-program team members. The checklist is always accompanied by comment sheets. These sheets should identify any discrepancies and what is needed to meet criteria standards. This type of checklist can be used by managers, supervisors and/or evaluators for the program design and developmental process evaluation (see Figure 1). Another type of checklist concerns learning conditions (see Figure 2).

Orienting and training evaluators, trainers and managers always should be done with relevant information provided by the HRD department. Then, review the plan's steps, evaluation criteria, checklists to be used, comment sheets and data collection forms (i.e., observations, interviews, test analysis, etc.).

All must first agree on what it will look like when it's done correctly in order to know how to measure.

A good orientation program involves everyone. Its purpose is to ensure complete agreement and understanding of the design, content, procedures, schedules, deadlines and expected results of the final program.

Lynne A. Tyson and Herman Birnbrauer are, respectively, vice president and president of the Institute for Business & Industry, Inc., Bensalem, Pa.

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Name of Evaluator _____ Date _____

Program Position _____

Directions for use: The purpose of this form is to provide a means for recording your observations of training activities and results. If a condition you observe is ok, check (✓) the first column. If a condition observed fails to meet established standards and the specific objective involved, check (✗) the second column and explain on the comment sheet.

OK	NOT OK	
___	___	1. Needs and Task Analysis
___	___	a. Analysis materials and methods are well designed.
___	___	b. Analysts are selected and trained properly.
___	___	c. Analysis is conducted in proper environment.
___	___	d. Number of people observed and interviewed is representative of the work force.
___	___	e. The analysis plans and design are followed.
___	___	f. The results are organized and communicated well.
___	___	g. Cost of analysis is detailed.
___	___	2. Objectives
___	___	a. Well-defined, planned procedures are used to determine which occupation/job/task requirement calls for organized (classroom or other) training/education/development action.
___	___	b. The objectives are analyzed and prepared completely and specifically.
___	___	c. Objectives are stated clearly in performance-oriented terms.
___	___	d. Objectives statements are complete with standards that specify how well the behavior must be performed.
___	___	3. Grouping of Objectives
___	___	a. Related objectives are organized into functional groups to aid logical development.
___	___	4. Training Site
___	___	a. A clear, realistic set of criteria, in terms of both learning and management factors, is used to determine where specific kinds of training should take place.
___	___	5. Prerequisites
___	___	a. Job performance requirements and objectives are analyzed to determine course prerequisites (aptitude) and requirements (previously learned knowledge and skills, i.e., mathematics and reading basics).
___	___	b. Prerequisites are checked against a sample population to refine them and determine their validity.
___	___	c. Entry skills are reanalyzed to determine if certain skills require precourse instruction or placement within the course.
___	___	6. Initial Sequence of Objectives
___	___	a. Objectives are sequenced in terms of both learning principles and management considerations.

Development Checklist

Position _____ Time _____

Be specific and keep in mind that your evaluation must focus on the trainees and learning results. The results of your observation should be discussed with appropriate members of the program team and, if meaningful, with the trainees as soon as possible after completion and filed as directed immediately.

- | OK | NOT OK | |
|-----|--------|--|
| ___ | ___ | 7. Organization of the Curriculum |
| | | a. Placement of similar and dissimilar objectives within the sequence is reexamined to determine best mix and location. |
| ___ | ___ | b. Trainees are reexamined, and each cluster of objectives is analyzed in terms of the basic types of learning required (skills, knowledges, attitudes and needs of the trainees). |
| | | 8. Learning Strategies (methods, media, materials) |
| ___ | ___ | a. Objectives are analyzed to determine/select the best mix of teaching/learning strategies and media. |
| | | 9. Time and Facilities |
| ___ | ___ | a. The objectives and associated strategies are analyzed to estimate training time and type of facilities required. |
| | | 10. Trainer Qualifications |
| ___ | ___ | a. Training/learning framework and strategies are reexamined to determine required training qualifications, availability of appropriate trainer talent, and any program adjustments required to resolve trainer availability problems. |
| | | 11. Developed Materials |
| ___ | ___ | a. Design framework containing objectives and strategies is used to develop sessions plans, materials/media and tests to support efficient learning. |
| | | 12. Session Plans |
| ___ | ___ | a. Session plans, materials and media are reexamined in terms of trainee needs; best sequence. |
| | | 13. Training Management Plan |
| ___ | ___ | a. Management plan is rechecked against changes in training sequence, strategy and media before finalization. |

The space below is provided for comments/explanation of items checked NOT OK.

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Figure 2—Learning

Name of Observer _____ Date _____

Program Observed (use outline for reference) _____

Directions for use: The purpose of this form is to provide a means for recording your observations of training activities. If a condition you observe is satisfactory/effective, check (✓) OK—the first column. If a condition observed fails to meet established standards and the specific objective involved, check (✗) the second column—NOT OK—and explain on the comment sheet.

CONDITIONS FOR EFFECTIVE LEARNING

OK	NOT OK	
—	—	1. Clarity of objectives and appropriateness of content
—	—	a. Objective statements are clear enough to be understood by trainee, trainers and manager.
—	—	b. Content matches objectives and is the appropriate level for the specific group of trainees.
—	—	2. Trainees' demonstrated performance
—	—	a. Prerequisites correlate significantly with trainee performance.
—	—	b. Trainees understand the objectives and content organization.
—	—	c. Trainees demonstrate achievement of specific objectives as indicated by tests (performance tests, written tests), assignments and class participation.
—	—	d. Trainees demonstrate positive attitudes.
—	—	e. Trainees are able to evaluate their own performance.
—	—	f. Trainees are able to evaluate the overall HRD system.
—	—	3. Trainers' demonstrated performance
—	—	a. Explains clearly to the trainees the objectives, content and organization of the program.
—	—	b. Interprets and uses effectively the program, session plans and training aids.
—	—	c. Presents content in an interesting and imaginative way.
—	—	d. Adheres to plans but adjusts to trainee differences.
—	—	e. Encourages continuous trainee participation.
—	—	f. Evaluates trainee performance continuously and informs trainees of results.
—	—	g. Exhibits a positive attitude toward trainees.
—	—	h. Evaluates the effectiveness of specific plans, materials and training strategies in terms of trainee results; informs managers and evaluators of results.
—	—	i. Exhibits knowledge of subject(s).
—	—	j. Demonstrates effective communication skills (speaks and writes effectively at the trainee level).
—	—	k. Is professional in manner and appearance.
—	—	l. Is cooperative.
—	—	4. Organization and sequence
—	—	a. Content is organized into manageable sessions.
—	—	b. Sessions organized into flexible modules.
—	—	c. Arrangement of objectives is from simple to complex.
—	—	d. Arrangement of objectives is efficient from a management point of view—that is, use of materials, sharing of equipment and facilities, and utilization of trainers.
—	—	5. Time Allocation
—	—	a. The schedule provides time for each session.
—	—	b. Estimated time expressed in session plans is reasonably accurate.

Conditions Checklist

Position/Function _____ Time _____

Be specific and keep in mind that your evaluation must focus on the trainees and learning results. The results of your observations should be discussed with appropriate members of the program team and, if meaningful, with the learners as soon as possible after completion and filed as directed immediately.

OK NOT OK

- | | | |
|-----|-----|---|
| ___ | ___ | 6. Training Strategies, Materials and Equipment |
| ___ | ___ | a. Methods/strategies are sound in terms of trainees. |
| ___ | ___ | b. The climate provides for motivation, involvement, recognition and sense of achievement. |
| ___ | ___ | c. Methods are suited to the specific group of trainees. |
| ___ | ___ | d. Methods surface trainees' problems and provide for additional assistance. |
| ___ | ___ | e. Trainees' understanding and achievement are checked against objectives and procedures. |
| ___ | ___ | f. Training aids enhance learning. |
| ___ | ___ | g. Actual job-related equipment/material is used when necessary. |
| ___ | ___ | h. Equipment is in workable condition. |
| ___ | ___ | i. Schedules are appropriate in support of objective, design and trainees. |
| ___ | ___ | 7. Facilities and Logistics |
| ___ | ___ | a. Training areas (including conference and study areas): |
| ___ | ___ | (1) are sufficient in number to support the program; |
| ___ | ___ | (2) are sufficient in size to support the program; |
| ___ | ___ | (3) are flexible; |
| ___ | ___ | (4) have lighting that conforms to established standards; |
| ___ | ___ | (5) have an acoustics/sound level that is comfortable and audible; |
| ___ | ___ | (6) are at a temperature that is comfortable. |
| ___ | ___ | b. Break areas are located in close proximity to the training area. |
| ___ | ___ | c. Comfort facilities are adequate in number and appropriate. |
| ___ | ___ | 8. Transportation |
| ___ | ___ | a. Adequate provisions for transporting trainees are available before, during and after program hours. |
| ___ | ___ | 9. Administration/Management |
| ___ | ___ | a. Pace of training strategies is efficient. |
| ___ | ___ | b. Number of staff/managers and trainers is appropriate for the program. |
| ___ | ___ | c. Cost of materials and facilities used correlates with the objectives and the content of the program. |
| ___ | ___ | d. The sharing of trainers, materials and facilities throughout the HRD system is made. |
| ___ | ___ | e. Provisions for reuse of materials throughout the HRD system are made. |
| ___ | ___ | f. Management and audit records covering all aspects of the HRD system (time, money, space, material) are accurate, comprehensive and up-to-date. They are used to exercise quality control over the entire system and to check original estimates made during the development process. |

The space below is provided for comments/explanation of items checked NOT OK.

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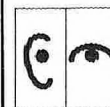
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