



COMPLEXITIES OF TRAINING AND DEVELOPMENT EVALUATION

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OBJECTIVES

- Example of training impact evaluation conducted by a university for a for-profit business and its client
- Connections to conference theme: "Evaluation in Complex Ecologies"
- Relationships: What contextual realities, power dynamics, and competing interests and values impact academically driven evaluations in for-profit environments?
- Responsibilities: What tensions between project implementation and professional standards for evaluation exist?
- Relevance: What complexities can be realistically simplified to maximize relevance?

BACKGROUND: TRAINING EVALUATION

- Brinkerhoff's (2003, 2006) "Success Case Method" (SCM):
 - Developed with the specific purpose of assessing the impact of training and development interventions on business goals
 - An efficient and cost-effective method of evaluative inquiry
 - Attractive to clients who want to demonstrate their impacts fast and post-hoc
 - Typically, SCM studies are implemented by training evaluation consultants such as by Robert O. Brinkerhoff himself

BACKGROUND: TRAINING EVALUATION

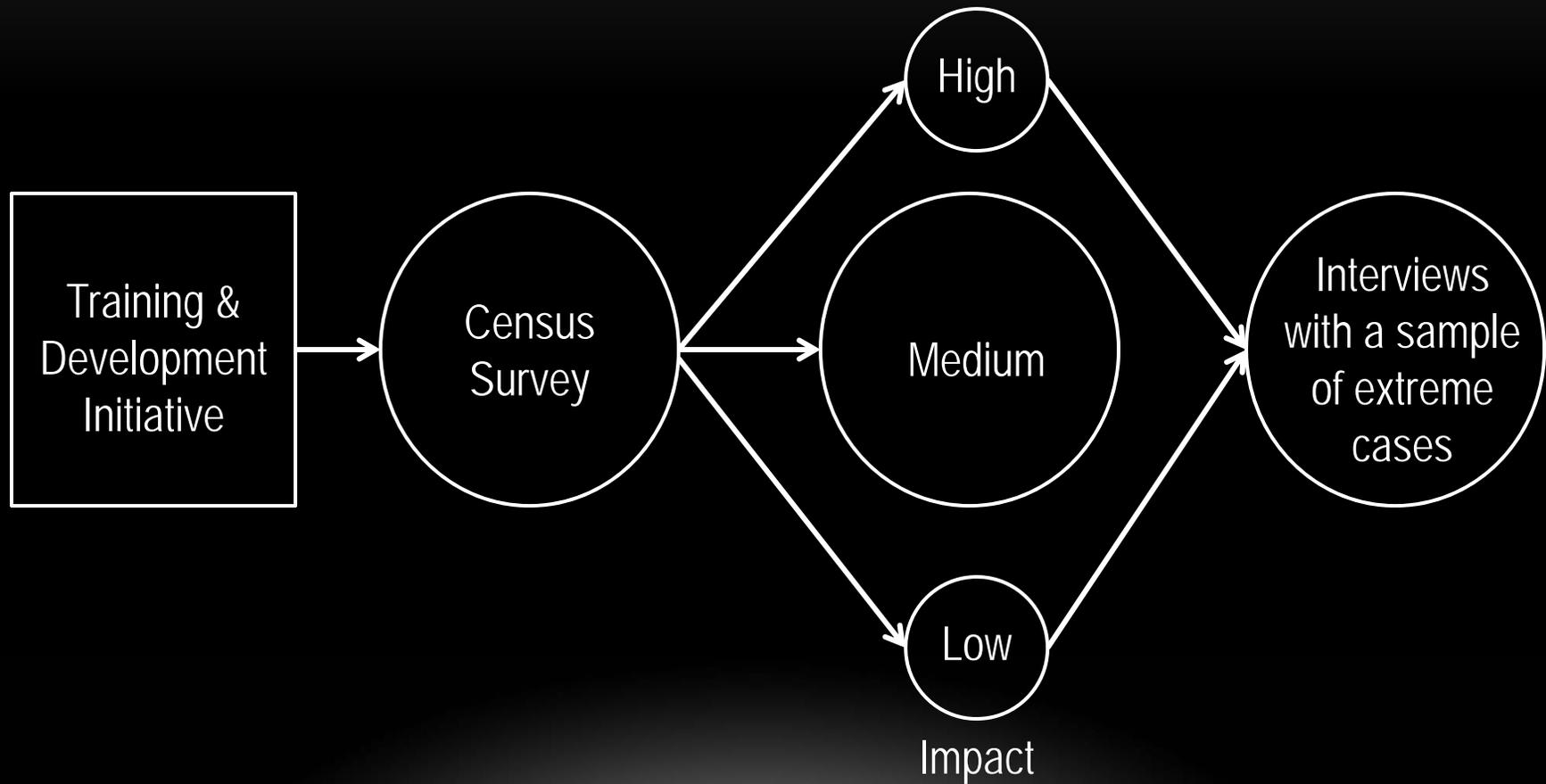
- Brinkerhoff's (2003, 2006) "Success Case Method" (SCM):
 - Formative purpose:
 - Midcourse modification of the intervention to maximize impacts on the bottom line
 - Summative purposes:
 - Training providers want to justify the need and costs of the interventions
 - Training clients want to see documented benefits from the training

Conducting training and development evaluation through universities, using modified versions of the SCM (e.g., Coryn, Schroeter, & Hansen, 2009) creates unique systemic complexities and particular tensions between simplicity and complexity.

TENSIONS BETWEEN SIMPLICITY & COMPLEXITY

	Simple	Complicated	Complex
Characteristics (Patton 2011)	<p>Close to agreement & certainty</p> <p>There is a plan and control</p>	<p>Socially</p> <ul style="list-style-type: none"> - Far from Agreement, Close to Certainty - Build relationships, create common ground <p>Technically</p> <ul style="list-style-type: none"> - Close to Agreement, Far from Certainty - Experiment, coordinate expertise 	<p>Far from certainty and agreement</p>
Example	<p>Evaluators replicate one of their own studies based on existing protocols and tools with repeat clients</p>	<p>Evaluators implement an evaluation plan for the first time with new clients</p>	<p>Evaluators developing a new method the utility of which is unknown as is the level of acceptance by a range of stakeholder groups from varying institutions</p>

THE SIMPLE: REPLICATING AN EVALUATION MODEL



RELATIONSHIPS

- Communication
- Power Dynamics
 - Purposes
 - Administration
- Locus of Population
 - Implementation

Simple Relationships

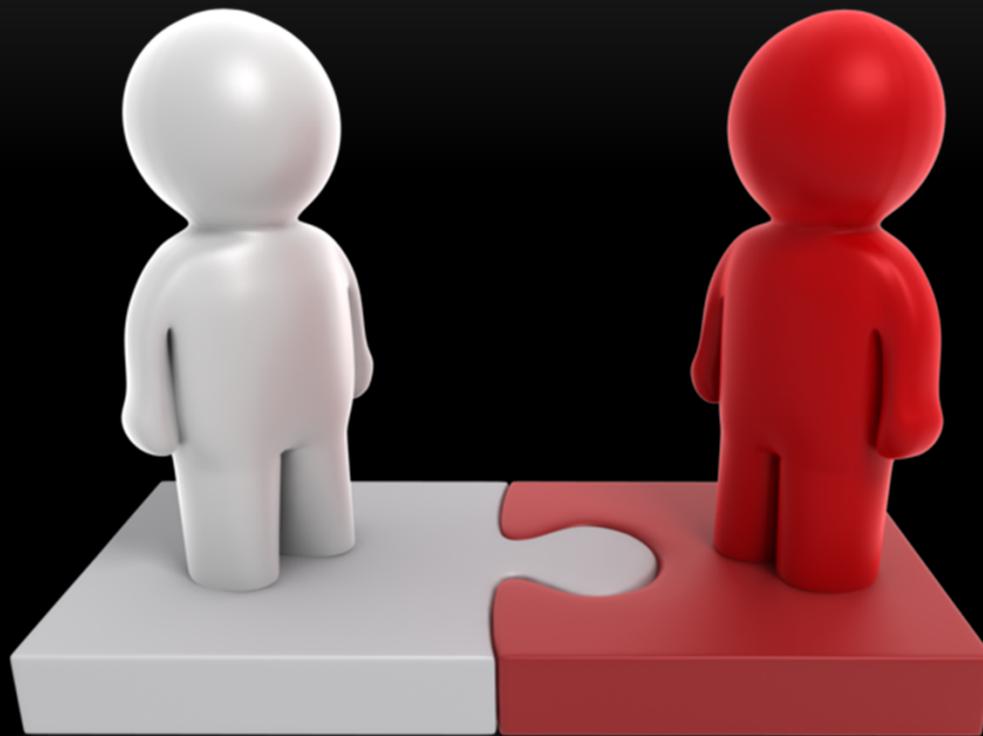


Client



Evaluator

Simple Relationships



Examples:

- Consultant and Client
- Inner-institutional communication

Direct Communication

between a small number of stakeholders who have developed a “shared language” and an accepted communication stream

Complicated Relationships



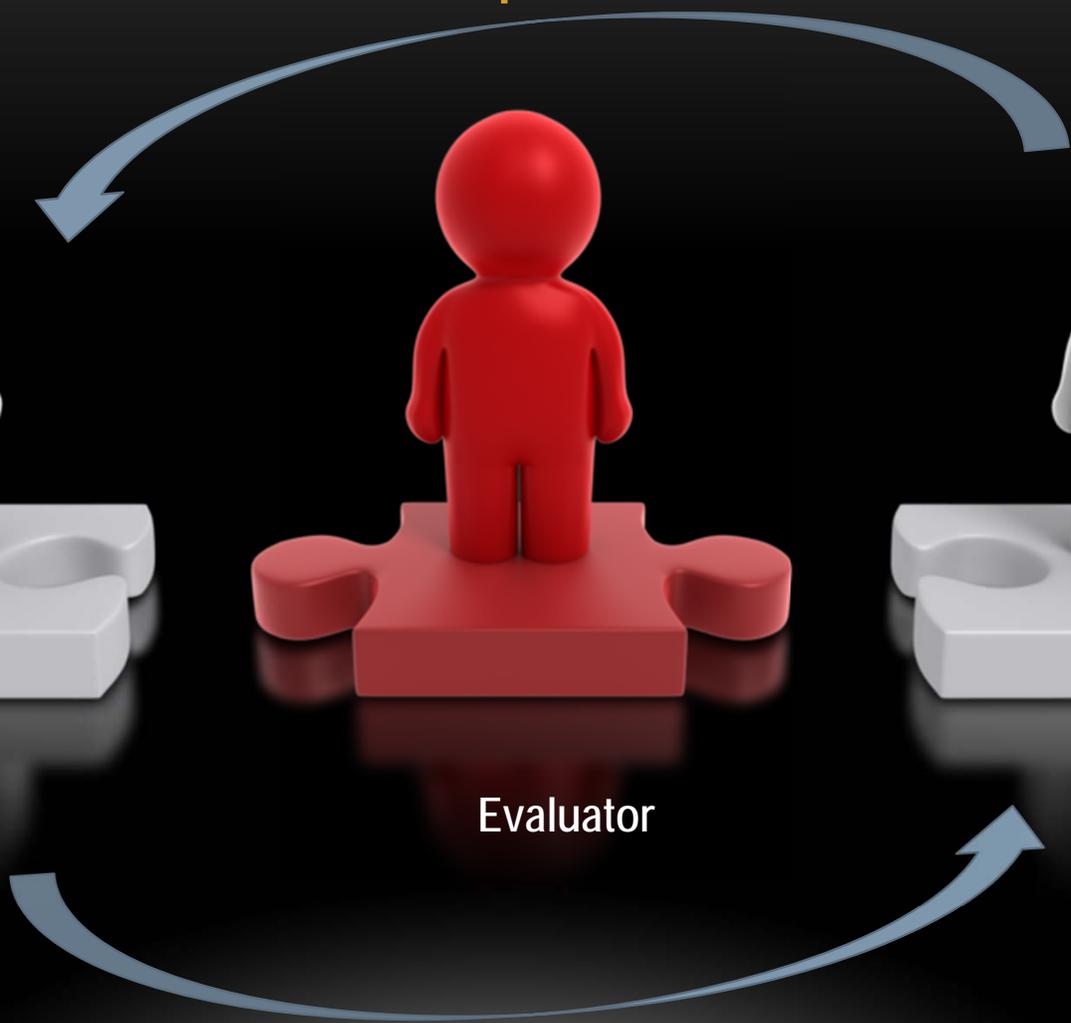
Client
Training provider



Evaluator

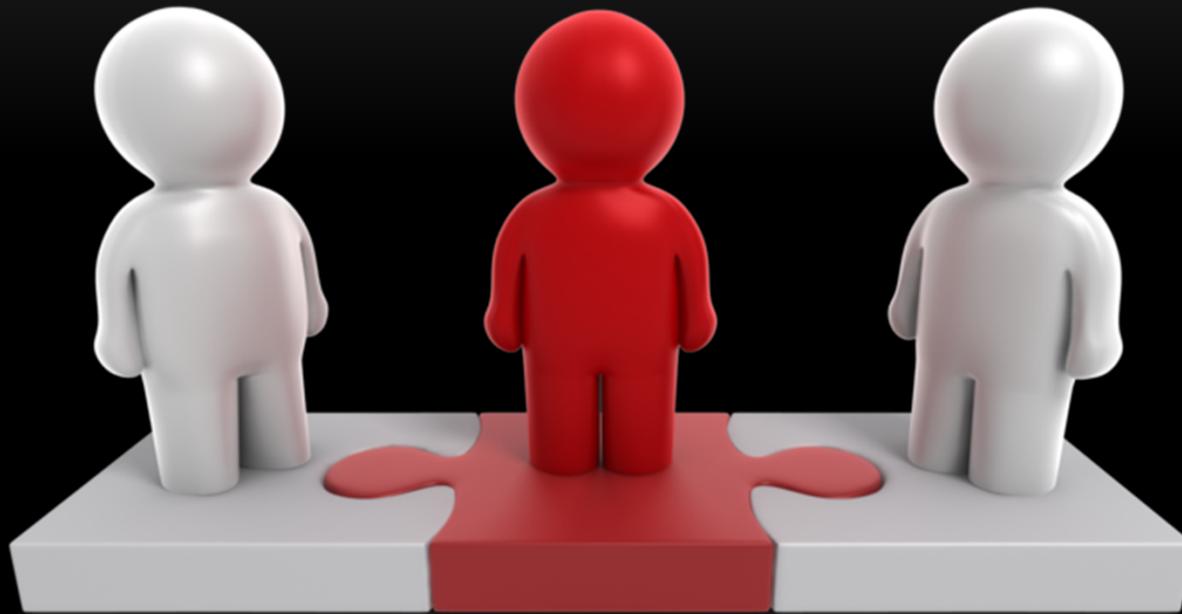


Meta-Client
Training client



Complicated Relationships

Example:
Learning
Languages



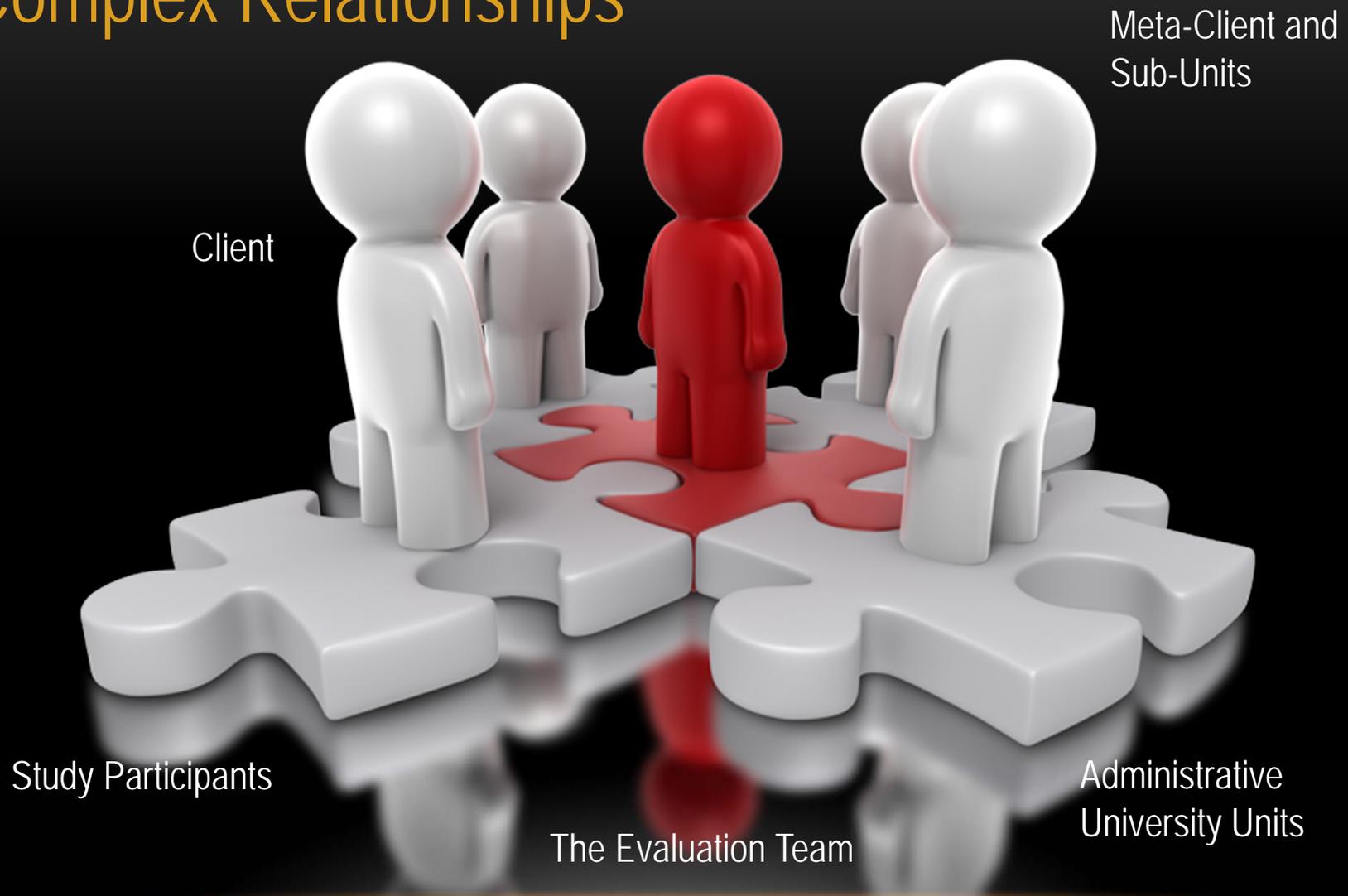
Multiple communication streams between a larger set of stakeholders who have committed to navigating issues of discipline/industry-specific language

Increased complexity



Example:
Time delays in
contracting, obtaining
information, etc.

Complex Relationships



Nonlinear communication among varying stakeholder subgroups with little "shared language"

MORE EXAMPLES

- Having access to the study population
- Communicating with respondent groups
- Managing competencies on the evaluation team
- Managing logistics

RESPONSIBILITIES: TENSIONS BETWEEN PROJECT IMPLEMENTATION AND PROFESSIONAL STANDARDS FOR EVALUATION

AEA Guiding Principles

- Culturally competent evaluation team
- Comprehensive understanding of context
- Reduce harm
- Understand and respect differences
- Include relevant perspectives and interests
- Access to evaluation information
- Balance client and other needs
- Public interest and good

Joint Committee Program Evaluation Standards

- U2: Attention to stakeholders
- U7: Timely and appropriate communicating and reporting
- F3: Contextual viability
- P1: Responsive and inclusive orientation
- P4: Clarity and fairness
- P5: Transparency and disclosure

RELEVANCE: SIMPLIFYING THE COMPLICATED AND COMPLEX

- When possible, set up master agreements that allow for easy amendment
 - Time at start-up high, but fast turnaround for amendments
- Develop an HSIRB protocol that can be amended or easily modified for future work
- Pilot test the method and develop tools for easy replication
- Debrief participating researchers to generate feedback for improving the next round
- Develop routines
- Develop relationships

Thank you!

