



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

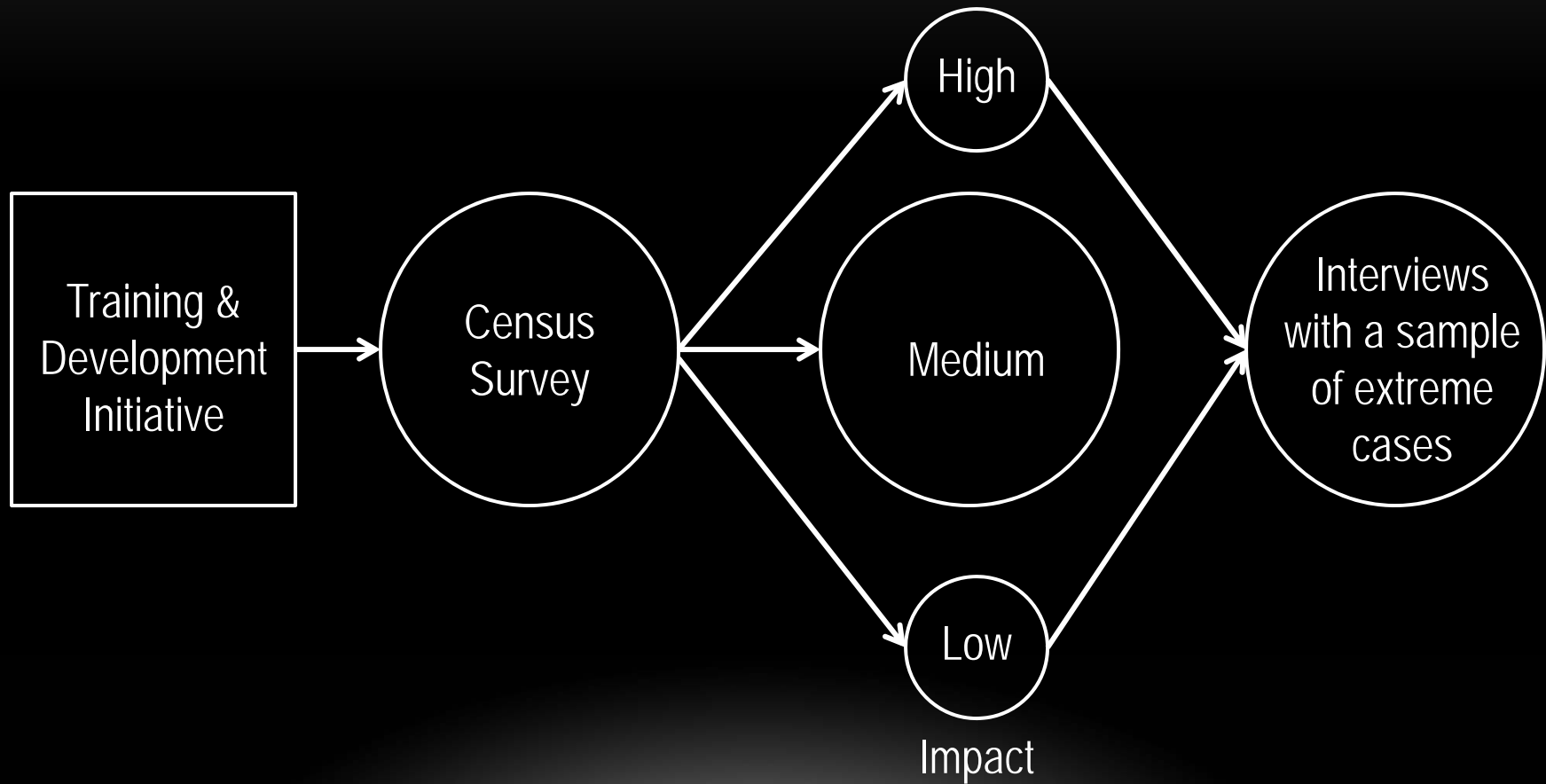
- Brinkerhoff's (2003, 2006) "Success Case Method" (SCM):
 - Formative purpose:
 - Midcourse modification of the intervention to maximize impacts on the bottom line
 - Summative purposes:
 - Training providers want to justify the need and costs of the interventions
 - Training clients want to see documented 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)	Close to agreement & certainty There is a plan and control	Socially <ul style="list-style-type: none"> - Far from Agreement, Close to Certainty - Build relationships, create common ground Technically <ul style="list-style-type: none"> - Close to Agreement, Far from Certainty - Experiment, coordinate expertise 	Far from certainty and agreement
Example	Evaluators replicate one of their own studies based on existing protocols and tools with repeat clients	Evaluators implement an evaluation plan for the first time with new clients	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

THE SIMPLE: REPLICATING AN EVALUATION MODEL



RELATIONSHIPS

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

Simple Relationships

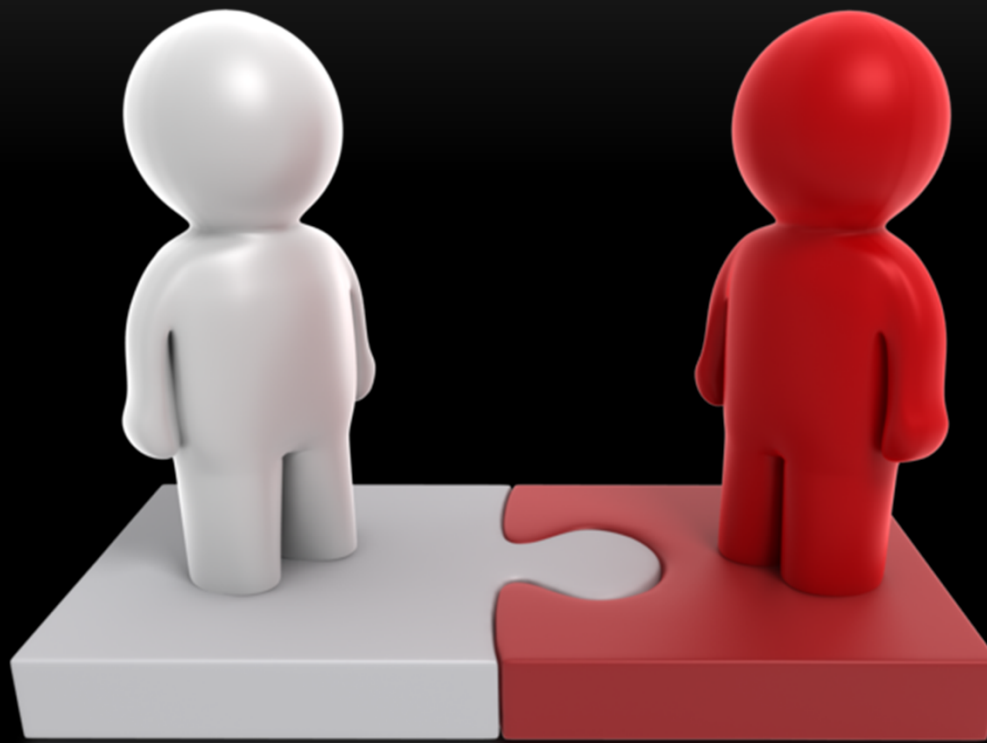


Client



Evaluator

Simple Relationships



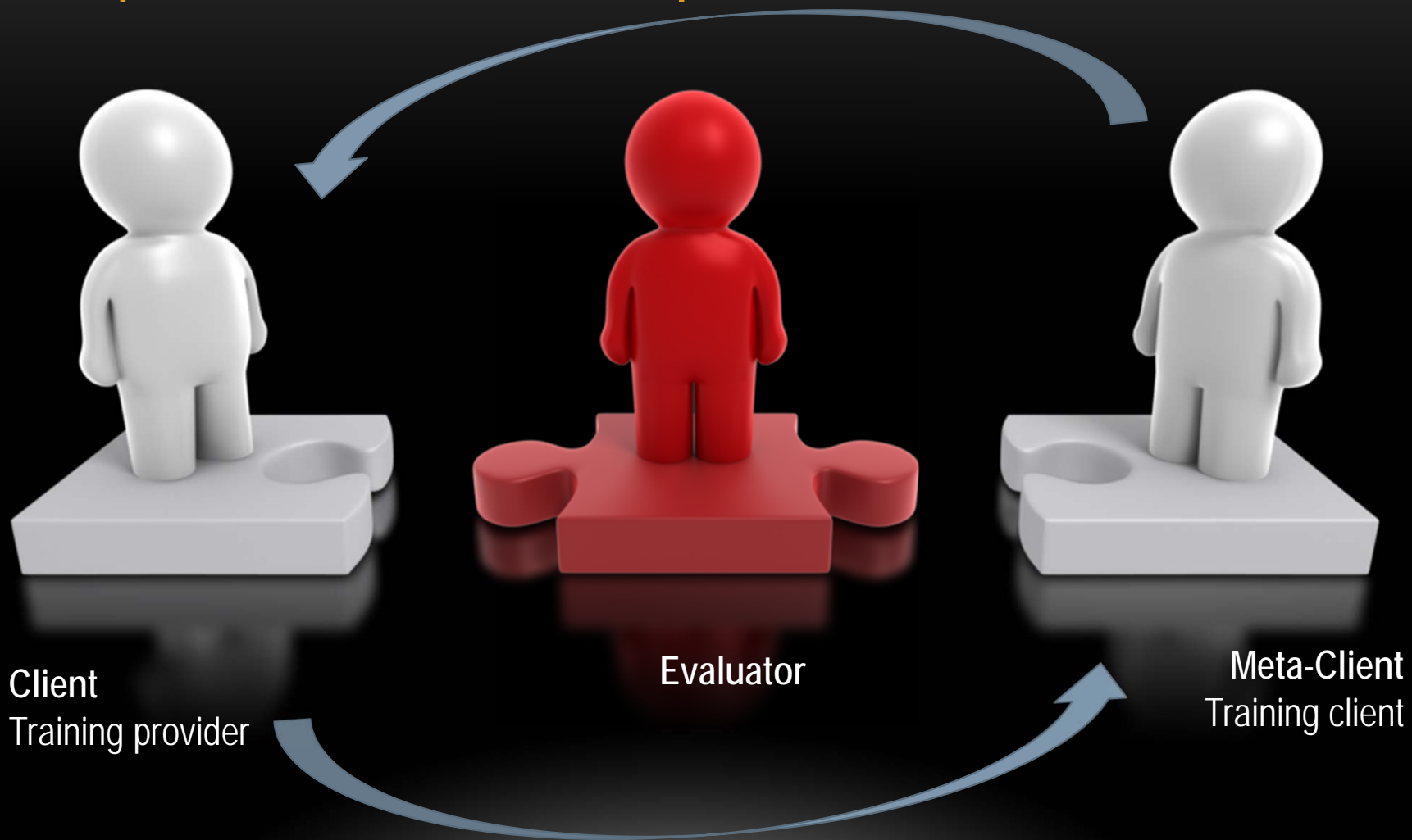
Examples:

- Consultant and Client
- Inner-institutional communication

Direct Communication

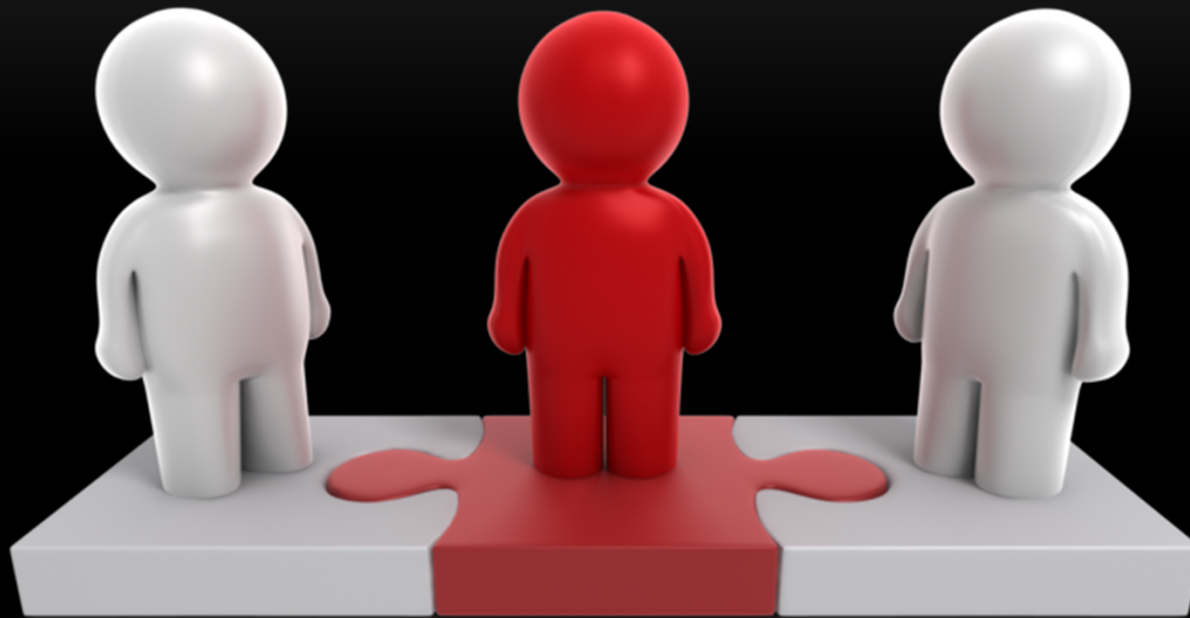
between a small number of stakeholders who have developed a “shared language” and an accepted communication stream

Complicated Relationships



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

Meta-Client

Client

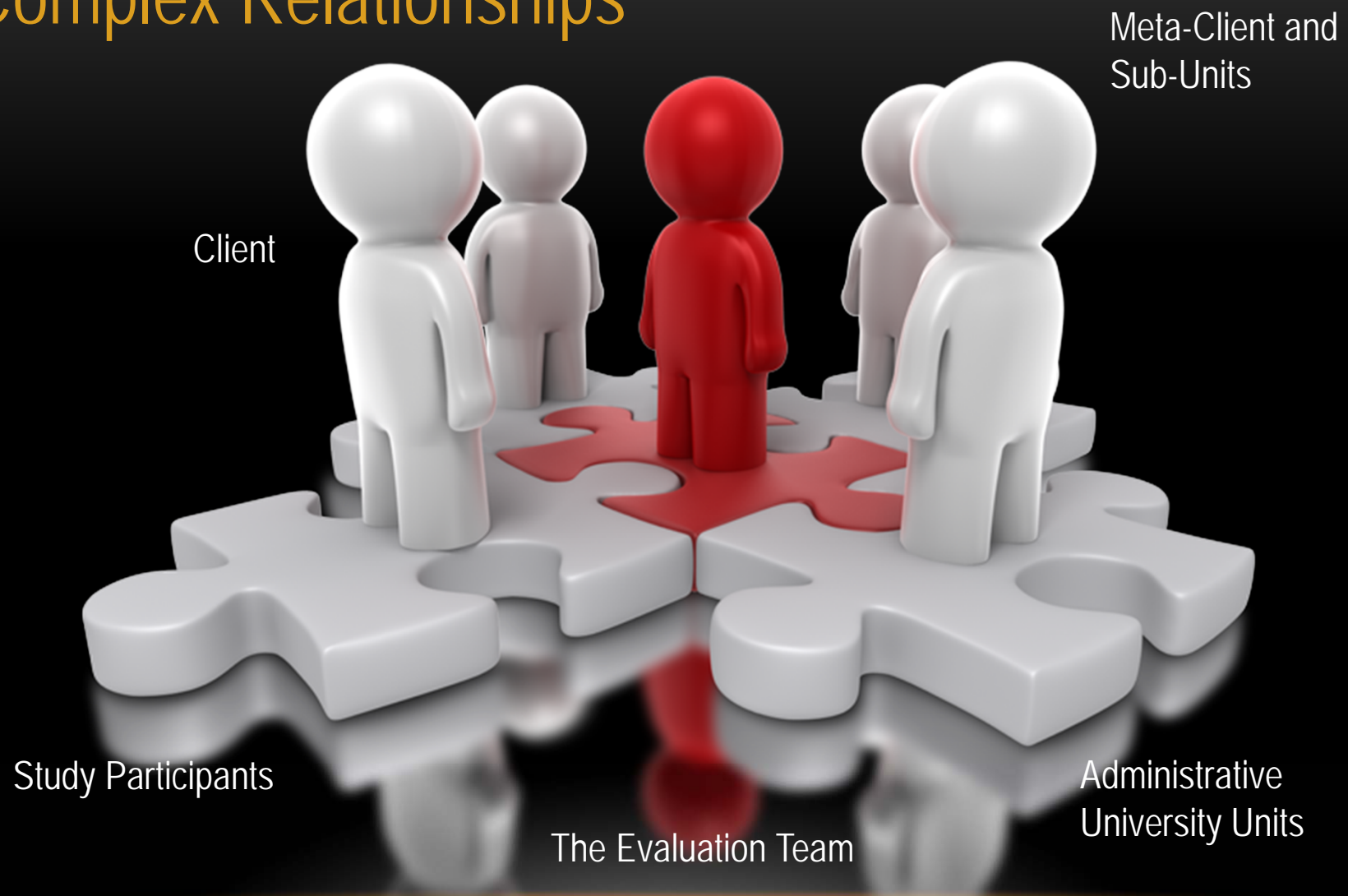
Administrative
University Unit

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

Evaluator



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
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Thank you!

