**Title of Evaluation Project**

Evaluators: Name, Name, and Name

Course Title

University Name

Semester, Year

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# Executive Summary

## Background

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## Evaluation Methodology

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## Evaluation Results

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Table 1. Place the Label above the Table

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Dimension** | **Title of the Evaluand**  Overall Quality: ***Good*** | | | | **Weighting** |
| 1. Curriculum alignment |  |  | ✔ |  | Critical |
| 2. Program implementation |  |  | ✔ |  | Important |
| 3. Leadership application |  |  |  | ✔ | Very Important |
| 4. Leaders’ network |  |  | ✔ |  | Important |
|  | ***Poor*** | ***Marginal*** | ***Good*** | ***Excellent*** |  |

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## Conclusions

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## Limitations and Reporting

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# 1. Tamrack, Inc.

Tamrack, Inc. (a pseudonym) provides cleaning supplies to hospitals and nursing homes. The company was founded in 2001, and it recently expanded its business from a regional company to a national corporation. In addition to its headquarters located in Boise, Idaho, the company now has branches across 10 states of the United States.

The recent expansion of the business created an immediate need for providing more structured training to its leaders to improve their competencies in leadership. A mid-tier management training program already exists in the company. However, it was designed with generic information, and it is no longer helpful for the mid-tier managers of this fast-expanding company, which requires a lot of cross-branch operations and virtual teamwork.

The Learning and Performance Solutions (LPS) department, located in the company headquarters, was in charge of revising the existing mid-tier management training program and deploying a new Leadership Skills Training Program at all branches. The growing needs for providing training to an increasing number of employees at multiple branches has been a challenge for the LPS department. Although the company has considered incorporating e-learning strategies into their training solutions, the current limited resources prohibit the LPS department from implementing them. The LPS department has used several training programs purchased from vendors. However, the LPS department realized that it would be best to develop the new Leadership Skills Training Program in-house, since the department can design the instruction tailored to the specific and constantly changing needs of the employees and the company.

The LPS department developed the new Leadership Skills Training Program for mid-tier managers using data from multiple sources, including the annual performance review, annual employee engagement survey data, and interviews with a sample of mid-tier managers and their direct reports. The data helped the LPS department identify gaps between desired and actual competencies of mid-tier managers and design the training program to close those gaps.

The Leadership Skills Training Program was launched in January 2019. During the first two months, the program was delivered to 60 participants at 2 of the 10 company sites. The program is scheduled to be delivered at the remaining sites by the end of 2019. Informal feedback received from the participants has been positive. In March 2019, Mr. Berg,[[1]](#footnote-1) the LPS director, requested the evaluation team to conduct a formal evaluation of the Leadership Skills Training Program. He serves as the client for this evaluation.

# 2. Leadership Skills Program and Stakeholders

## 2.1. Instructor-Led Leadership Skills Training Program

The leadership skills program is an instructor-led, three half-day face-to-face training program that teaches participants about different leadership styles and coaching skills. The program is designed with some lecture-style components followed by interactive group activities. The program’s daily activities are outlined in Table 2.

**Table 2.** Daily Activities of the Leadership Skills Training Program

|  |  |  |
| --- | --- | --- |
| **Day 1** | **Day 2** | **Day 3** |
| * Introduction * Tamrack Leadership Competencies Model * Different leadership styles – when/where, what, why, and how * Emotional intelligence * Group activities – effective communication | * Coaching – What is effective coaching, and how do you know when it is effective? * The GROW model of coaching * Thomas-Kilmann conflict model * Role-play exercises – Active listening | * Performance evaluation methods * 360-degree feedback * Ways to increase employee engagement * Group activities – Action plan for developing networks among leaders |

In addition to the main goal of helping participants increase their knowledge, skills, and attitudes about effective leadership skills, another intended outcome of the Leadership Skills Training Program is to help participants develop a network for sharing information such as lessons learned and provide support for handling challenges and conflicts that may arise in the workplace.

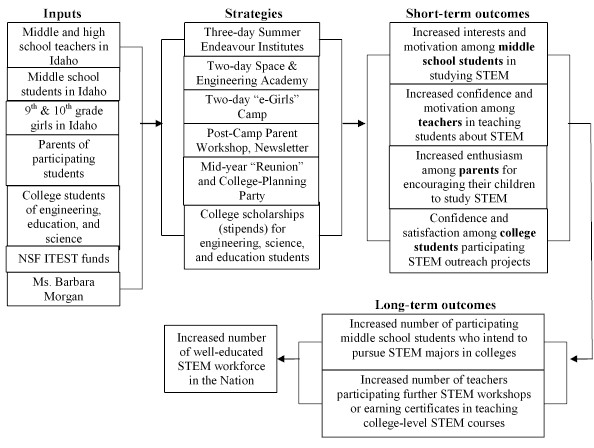
Through communication with the client, the evaluation team helped develop a training impact model for the Leadership Skills Training Program. Table 3 is the training impact model, outlining the means and end results of the program:

* Resources: Facilities, tools, materials, data, personnel, etc. that the program will use
* Activities: Process that the program will execute
* Program capabilities: Knowledge, skills, and attitudes that participants will acquire
* Critical actions: Job-specific behaviors that participants will exhibit
* Key results: Job-specific outcomes that participants will leave behind as a result of their job behaviors
* Business goals: Organizational outcomes to which the program will contribute

**Table 3.** Leadership Skills TrainingImpact Model

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Resources** | **Activities** | **Program capabilities** | **Critical actions** | **Key results** | **Business goals** |
| By using the following resources:   * Organizational goals * Customer feedback * Annual engagement survey data obtained from different branches * Mid-tier managers and their direct reports * Director of the Learning and Performance Solutions Department * Instructional designers * Trainers * Training facility * Materials of the existing Leadership Skills Training Program * New training resources about different leadership styles and the GROW model of coaching | By completing the following steps:   * Review existing Leadership Skills Training Programs * Conduct performance gap analysis and learner analysis with mid-tier leaders and their direct reports * Develop a new leadership training program to close the mid-tier leaders’ performance gap * Enroll mid-tier leaders into the program * Conduct Levels 1 and 2 evaluations at the end of program * Conduct Level 3 evaluation 3 months after program * Conduct Level 4 evaluation 6 months after program | Mid-tier managers should acquire:   * Knowledge of Tamrack Leadership Competencies Model * Knowledge of different leadership styles * Knowledge of the importance of using different styles for different purposes * Knowledge of how cultural self-awareness affects business outcomes * Skills required for active listening * Willingness to use the GROW model of coaching * Willingness to make personal bonds among peers * Willingness to provide feedback | Mid-tier managers should be able to perform the following tasks:   * Diagnose work situations where leadership is needed * Use an appropriate leadership style(s) depending on the context * Provide timely, relevant, and effective feedback to peers and direct reports * Provide timely and effective coaching to direct reports * Provide strategies to employees that facilitate collaboration, corporation, and/or completion among them | Mid-tier managers’ work performance should produce the following observable on-the-job results:   * A common language used during interactions between leaders and their direct reports * Effective change and conflict management results * Positive relationships between leaders and direct reports * Improved team capacity * Organizational culture where leaders network, share new knowledge, and apply new shared knowledge with one other | The training program will contribute to achieving the following organizational goals:   * Provide consistent and excellent services to external customers * Increase organizational agility * Increase company revenue * Become a sustainable organization * Make a transition from national operations to international operations |

***Note:*** If the PLM is a flowchart, present it as a figure.



**Figure 1.** Place the label under the figure.

## 2.2. Stakeholders

There are three types of stakeholders for the Leadership Skills Training Program.

**Upstream Stakeholders**

Several stakeholders played a role in deciding to provide a new Leadership Skills Training Program and performing the actual design, development, and delivery of the program. The key upstream stakeholders are the following:

* Ms. Gibson, the human resources (HR) director
* Mr. Berg, the LPS director
* Three instructional designers
* Two trainers

**Direct Impactees**

The past and future participants of the Leadership Skills Training Program are the direct impactees of the program. They are all mid-tier management level employees in 10 branches.

* At the time of writing this proposal, 60 managers have completed the program.
* About 200 managers will complete it within next few months.
* Thus, a total of approximately 260 managers fall into this direct recipients group.

**Indirect Impactees**

Success or failure of the Leadership Skills Training Program would have an impact on not only the immediate recipients of the program (mid-tier managers), but also other groups of people:

* Direct reports
* Employee colleagues of impacted direct reports
* External customers who interact with impacted managers, impacted direct reports, and impacted colleagues

The primary indirect impactees of the program are direct reports of the mid-tier managers who complete the program. This includes the approximately 1,000 employees.

The secondary indirect impactees of the program are approximately 4,500 employees who closely interact with the direct reports of the managers who complete the program.

External customers will also be affected by the quality of the products that they receive, which is indirectly impacted by the organizational leadership and culture that this leadership training program aims at improving.

# 3. Evaluation Methodology

## 3.1. Evaluation Purpose and Type

Based on discussions with Mr. Berg (the evaluation client), Ms. Swanson (an instructional designer), and Ms. Kennedy (a trainer), the evaluation team learned that their primary intent for conducting this evaluation is to assess areas for improvements in the program. The three stakeholders want the evaluation team to assist the LPS department in revising the program and changing the relevant support system for the remaining sites. Thus, it was decided to conduct a formative evaluation of the Leadership Skills Training Program, with the overall evaluation purpose being to find areas of the Leadership Skills Training Program and its support system that need to be improved in order to produce more positive outcomes.

This formative evaluation aims at assessing how well the program is designed to have a positive impact on improving mid-tier managers’ knowledge of, skills for, and attitudes toward using effective leadership to help achieve organizational goals. Therefore, it is a goal-based evaluation, focusing on the program’s worth. The evaluation results will be used to make necessary improvements to close gaps in expected outcomes.

## 3.2. Dimensions, Evaluation Questions, and Importance Weighting

Through initial communication with the client (Mr. Berg) and based on the training impact model for the Leadership Skills Training Program (see Table 3in the previous section), the evaluation team began to develop a list of specific program dimensions to investigate. Two additional upstream stakeholders (an instructional designer and a trainer) reviewed and provided their input on the draft list of dimensions via e-mail.

Based on the three key stakeholders’ input, the evaluation team proposed several dimensions and met with the three stakeholders to finalize key dimensions to investigate. During the meeting, the stakeholders and the evaluation team consulted the program’s training impact model together. They finally agreed on investigating four dimensions of the program. Once the dimensions were established, the evaluation team discussed with the three key stakeholders how they intended to make use of the evaluation findings. Based on their input, the evaluation team helped them identify the relative degrees of importance weighting (IW) among the dimensions. Results are shown below (also see the first column of Table 4):

1. Curriculum alignment (Critical)

2. Program implementation (Important)

3. Leadership application (Very important)

4. Leaders’ network (Important)

## 3.3. Data Collection Procedure and Methods

As the overall approach to this evaluation, the evaluation team is following Chyung’s (2018) 10-step evaluation procedure. The 10-step procedure assists the evaluation team to design an evaluation based on the stakeholders’ needs and the stakeholders’ use of the evaluation findings. The evaluation team is also using multiple levels of the four-level training evaluation framework (Kirkpatrick, 1996) for evaluating the four dimensions:

1. Curriculum alignment (Level 1 Reaction, based on participants’ inputs about how well the curriculum is designed to help close their performance gaps)

2. Program implementation (Level 1 Reaction, based on participants’ inputs about how adequate the overall program schedule was)

3. Leadership application (Level 3 Behavioral Change, based on participants’ self-assessment of their behavior and environmental support, and their direct reports’ assessment on their manager’s behavior and environmental support)

4. Leaders’ network (Level 4 Results, based on participants’ self-assessment of their behavior and their direct reports’ assessment of their manager’s behavior)

The evaluation team will also apply Brinkerhoff’s (2006) Success Case Method while evaluating Dimensions 3 and 4, to investigate factors that influence leaders’ successful and nonsuccessful application of their knowledge and skills and their networking with other leaders.

While incorporating these frameworks, the evaluation team will use multiple sources of data, including the LPS director, instructional designers, managers (program participants), and direct reports of the managers. Additionally, the evaluation team will use multiple types of data collection methods:

* Survey – Web-based survey questionnaires will be administered.
* Interview – Semi-structured telephone interviews will be conducted.
* Extant data review – Existing Level 1 and Level 2 evaluation data will be reviewed.
* Observation – Web conferencing among leaders will be observed.

The multiple types of data collection methods are selected to complement strengths and weaknesses of each method, and the data collected from multiple types/sources will be triangulated to draw credible conclusions. Three evaluation team members will also compare their analysis and interpretation of extant data to avoid drawing biased conclusions. Data collection methods are summarized in Table 4.

The following is a tentative timeline for the implementation phase to be completed in 2019:

* Data collection instrument development – March 4 through March 24
* Data collection – March 18 through April 14
* Data analysis – April 1 through April 21
* Preparation of a final report – April 15 and 30
* Delivery of a final report to the client – April 31

**Table 4.** Data Collection Methods

|  |  |  |  |
| --- | --- | --- | --- |
| **Dimension** | **Data collection method** | **Instrument to be developed and used** | **Rationale for using multiple sets of data (critical multiplism and triangulation)** |
| **1. Curriculum alignment**: How well is the curriculum designed to help close the managers’ performance gaps?  TIM: Resources and Activities  IW: Critical | 1-1. Record review of the curriculum | 1-1. Document review checklist | This is a critical dimension; thus, it is important to obtain comprehensive information. Two types of document reviews will help identify gaps in the alignment between the content and the expected performance outcomes. This information will be compared to the key upstream stakeholders’ perspectives on how the content is designed to facilitate performance improvement. |
| 1-2. Record review of Level 1 evaluation data obtained from previous training sessions | 1-2. Document review checklist |
| 1-3. Semi-structured telephone interview with the LPS director, three instructional designers, two trainers, and a sample of managers (n = 6) | 1-3. Interview solicitation e-mail message, informed consent form, and interview questions |
| **2. Program implementation**: How adequate is the overall program implementation process?  TIM: Activities  IW: Important | 2-1. Record review of the training schedule and other relevant information, including Level 1 evaluation data | 2-1. Document review checklist | The document review will help identify factors that facilitate or hinder the success of program implementation. This information will be compared to the actual participants’ (managers) perspectives. At least a 50% survey return rate should be obtained.  More information about various factors is expected to be revealed from the interviews, which will be compared to other types of data for consistency. |
| 2-2. Web-based survey with all managers who completed the program (n = 60+) | 2-2. Web-based survey questionnaire; survey respondents’ names will be asked but will be kept confidential |
| 2-3. Interview with the LPS director, three instructional designers, two trainers, and a sample of managers (n = 6) | Added to 1-3 (1-3 and 2-3 are completed in the same interviews) |
| **3. Leadership application**: How well are the managers applying their new leadership knowledge and skills? How supportive is the work environment for them to use their new skills?  TIM: Critical actions (and Resources and Activities for improvement)  IW: Very important | 3-1. Web-based survey with all managers who completed the program | Added to 2-2 (2-2, 3-1, and 4-1 are completed in the same survey) | This is a very important dimension. Information will be obtained from both managers and their direct reports, and the two sets of information will be triangulated. The in-depth interviews will also help identify various factors that may influence the success and nonsuccess of performance outcomes, which the surveys may not reveal. |
| 3-2. Semi-structured telephone interview with three or four success and three or four nonsuccess cases of managers who completed the program | 3-2. Interview solicitation e-mail message, informed consent form, and interview questions |
| 3-3. Anonymous web-based survey with all direct reports of the managers who completed the program | 3-3. Anonymous web-based survey questionnaire |
| **4. Leaders’ network**: How and how well are the mid-tier leaders using their network? What other support do they need to effectively network with each other?  TIM: Key results (and Resources and Activities for improvement)  IW: Important | 4-1. Web-based survey with all managers who completed the program | Added to 2-2 (2-2, 3-1, and 4-1 are completed in the same survey) | Survey, interview, and observation methods will help assess the type of network that managers have established and the quality of the network from different angles. The interviews will again help identify various factors that may influence the success and nonsuccess of performance outcomes. |
| 4-2. Semi-structured telephone interview with three or four success and three or four nonsuccess cases of managers who completed the program | Added to 3-2 (3-2 and 4-2 are completed in the same interviews) |
| 4-3. Observation during web conferencing among managers who network with others | 4-3. Observation checklist and informed consent form |
| In summary, the following instruments will be developed:   * Three document review checklists (1-1, 1-2, and 2-1) * Two web-based survey questionnaires (2-2/3-1/4-1, and 3-3) * Two interview instruments (1-3/2-3, and 3-2/4-2) * One observation checklist (4-3) * Informant solicitation e-mails and informed consent forms as needed | | | |

*IW*, Information weighting; *LPS*, Learning and Performance Solutions (department); *TIM*, training impact model.

# 4. Feasibility and Risk Factors

## 4.1. Feasibility

The following is a summary of the evaluation team’s assessment on project feasibility:

**1. Maturity.** The program has been implemented in two branches, which can provide enough information about what went well and what should be continued, and what did not go well and what should be changed.

**2. Scope.** The project can be completed within the requested time frame (8 weeks upon an approved proposal), given enough support and resources for the project.

**3. Support.** The client and other upstream stakeholders with whom the evaluation team has communicated so far have shown enough interest and support for the evaluation. The stakeholders are interested in using the evaluation findings to make improvement on the program. The client has approved giving the team full access to the training materials and groups of new employees and supervisors. The team is permitted to gather data by phone and/or via e-mail during the employee work hours.

**4. Ethical concerns.** Although there have not been any signs that raise ethical concerns, the fact that the evaluation team is composed of external evaluators is something to keep in mind since it may prevent the team from having access to the necessary data in a timely manner. The evaluation team will also ensure confidentiality of data. In particular, the data collected from using the Success Case Method can be sensitive.

**5. Resources.** The following resources will be used during this evaluation:

* Expertise/capacity
* The evaluator’s expertise in conducting program evaluations (level: developing). The project will benefit from having this three-member evaluation team, possessing project management skills, web-based survey design skills, interview skills, and writing skills.
* The university instructor who supervises the project (level: expert)
* Funds
* No additional financial costs are imposed to the client/organization.
* Time
* The evaluation team has committed their time during 8 weeks to implement the approved evaluation plan and submit a final evaluation report.
* The client and stakeholders are expected to commit their time to provide necessary data and communicate with the evaluation team.
* Facilities/communication
* Most interactions between the evaluator and the client/stakeholders will be done via e-mail, web conference, and/or telephone. Some interactions may occur face-to-face, likely at the client site.

Based on the evaluation team’s assessments on project feasibility, the team has concluded that it is a feasible project to complete within the expected time frame and given resources.

## 4.2. Risk Factors

To complete the evaluation project successfully, the evaluation team will monitor the following risk factors and collaborate with the program stakeholders to implement strategies to manage the risk factors as needed:

A. Ineffective communication among the evaluation team members – The three members of the evaluation team will communicate in person, by phone, via e-mail, or through a conferencing system on a daily basis. All members of this evaluation team are familiar with virtual communication methods and are committed to successful completion of the project. Thus, it is unlikely that the project would be jeopardized by this risk factor.

B. Failing to meet the time frame for project completion – The client has a specific time frame (8 weeks) for the evaluation project to be completed. To meet the expectation, it is critical that all communications between the evaluation team and the program stakeholders (including the evaluation client) be done efficiently. Some delays in meeting project milestones may occur; however, there is adequate time built into the project timeline to make up short-term schedule slips.

C. Lack of time for stakeholders to participate in evaluation – To help stakeholders participate in data collection, it is important that they be allowed to spend time during their work hours to complete surveys and interviews. With the client organization’s support, this arrangement can be easily made.

D. Stakeholders’ lack of motivation in participating in surveys and interviews – It is critical to have full participation of the stakeholders, especially the managers, during data collection. The evaluation team and the upstream stakeholders need to use effective strategies to motivate the managers to participate in data collection since many of them may suffer from survey fatigue. It is essential to receive support from the client organization to achieve a high survey return rate and obtain interview volunteers.

E. Ineffective communication between the evaluation team and the stakeholders – Most of the communications between the evaluation team and the program stakeholders will be via e-mail or by phone, which raises a concern for potential communication breakdown. Although the client and upstream stakeholders have shown high commitment to the project so far, failure to have effective communication between the two parties would result in detrimental damage to the project. The evaluation team will be responsive to the stakeholders’ requests by returning e-mails or phone calls within 24 hours and ask for clarification whenever needed. The team requests the stakeholders to do the same.

Table 5 summarizes the risk assessment results. Overall, it is the evaluation team’s opinion that the potential costs for dealing with consequences after implementing the program at the remaining branches without having an opportunity to conduct an evaluation and to improve the program quality are greater than costs for completing the evaluation project with the identified risks and unknown risks that may be discovered during the project.

Table 5. Risk Assessment Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Damage to  project**  **Likelihood** | **Minor** | **Moderate** | **Substantial** | **Detrimental** |
| **Unlikely** |  |  | A. Ineffective communication among evaluation team members | E. Ineffective communication between evaluation team and stakeholders |
| **Maybe** |  | B. Failing to meet time frame for project completion | D. Stakeholders’ lack of motivation in participating in surveys and interviews |  |
| **Likely** |  | C. Lack of time for stakeholders to participate in evaluation |  |  |

# 5. Evaluation Results

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## 5.1. Dimension

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## 5.3. Dimension

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# 6. Conclusions

## 6.1. Overall Quality

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**Table 6.** Title of the Table

|  |  |  |  |
| --- | --- | --- | --- |
| **Dimension** | **Training impact model** | **Importance weighting** | **Results** |
| **1. Curriculum alignment** | Activities | Critical | Good |
| **2. Program implementation** | Activities | Important | Good |
| **3. Leadership application** | Critical actions | Very important | Excellent |
| **4. Leaders’ network** | Key results | Important | Good |

## 6.2. Recommendations

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# 7. Meta-evaluations and Limitations

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# 8. Reporting

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# Appendix . Title

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1. All personnel names presented in this document are pseudonyms. [↑](#footnote-ref-1)