WED 563

Training Measurement and Evaluation
Tues. 6 – 8:30 p.m. Pulliam Hall Rm. 219

SYLLABUS

Instructor: C. Keith Waugh, Ph.D.
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219 Pulliam Hall
Phone: (618) 453-4868

Office Hours: Monday, Tuesday & Thursday, 10 a.m. - 12 p.m. and by appointment

COURSE DESCRIPTION:
Evaluation systems and activities for measuring and evaluating training programs. Application of research methods and data analysis in the human resource development process, with concentration on assessing trainee reaction and planned action, learning, skill, business impact and return on training investment.

NOTE: You will need a calculator for this course. You are strongly encouraged to purchase and bring with you to class the TI 30x IIs. This can be purchased at most retail or office supply stores (e.g., Walmart, Target, Staples, etc) and will be the calculator that we use in class.

OBJECTIVES:

Upon the completion of the course, students will be able to:

1. Explain roles, definitions and foundations of training evaluation
2. Identify ramifications of measurement imperative in HRD environments
3. Describe Phillip's training evaluation model and identify design issues relating to HRD
4. Perform data collection and analysis procedures relating to the evaluation of trainee reaction and planned action
5. Perform data collection and analysis procedures relating to the evaluation of the training transfer of learning
6. Perform data collection and analysis procedures relating to the evaluation of the training transfer of skill application
7. Perform data collection and analysis procedures relating to the evaluation of training impact on business outcomes
8. Perform data collection and analysis procedures relating to the calculation of return on training investment
9. Identify HRD program evaluation implementation issues and strategies

TEXTBOOKS:

SCHEDULE:
- Aug. 19 Orientation and expectations for course
  Phillips – Chapter 1
  Historical Foundations of Evaluation
- Aug. 26 Phillips – Chapters 2, 3
  Evaluation Models and Processes in HRD
- Sep. 2  Phillips – Chapters 4, 5
  Methods and procedures of Evaluation in the Results-Based HRD Model / Sources of Evaluation Data

- Sep. 9  Phillips – Chapter 6
  Instrument Construction / Tests of Validity and Reliability

- Sep. 16  Phillips – Chapter 6, continued

- Sep. 23  Phillips – Chapter 7
  Evaluation Design

- Sep. 30  Phillips – Chapters 8
  Level I & II Evaluation: Methods and Procedures

- Oct. 7  Phillips – Chapter 9
  Level III Evaluation: Methods and Procedures

- Oct. 14  No Class (Fall Break)

- Oct. 21  Mid-Term Exam

- Oct. 28  Phillips – Chapter 10
  Level IV Evaluation: Methods to Isolate the Effects of Training

- Nov. 4  Phillips – Chapter 11
  Methods to Convert Evaluation Data to Monetary Benefit

- Nov. 11  No Class (Veterans Day)

- Nov. 18  Phillips - Chapter 12, 13
  Identifying Intangible Measures / Determining Program Cost

- Nov. 25  Phillips – Chapter 14
  Data Analysis Methods in Evaluation

- Dec. 2  Phillips – Chapter 15, 16 & 17
  Level V Evaluation: Calculating ROI; Evaluating Outside Resources
- Dec. 9    Final Exam

*Note: This is a tentative schedule of topics to be covered. The order and/or topic areas may be changed at the discretion of the instructor with proper notification to students.

**SUGGESTED READINGS:**


**COURSE PRODUCTS:**

- Midterm Exam (Oct. 21) ..................................................100 points
- Final Exam (Dec. 9) ..........................................................100 points
- Evaluation Unit – Written (Due Dec. 5) ...............................100 points
- Class Attendance and Participation .....................................100 points

**GRADING SCALE:**

A = 360 to 400 points
B = 320 to 359 points
C = 280 to 319 points
D = 240 to 279 points
F = Below 240 points

**ATTENDANCE AND MAKE-UP POLICY:**

Interaction with your instructor and student is an integral part of the learning process. Therefore, your attendance in class is required. Failure to attend will result in a reduction of class attendance and participation points. If it is absolutely necessary to be absent, it is
important that you notify your instructor prior to the class meeting. Any missed tests, presentations or assignments may be made up at a later date if the student has been given advanced approval by the instructor. Students failing to officially withdraw before the official drop date will receive a failing grade "F" for the course.

**LATE WORK POLICY:**

All assignments are required to be submitted to the instructor by the posted due date. Any assignments that are turned in after the due date, without prior approval from the instructor, will result in a reduction of the student's final grade by one letter grade.

**Emergency Procedures:**

Southern Illinois University Carbondale is committed to providing a safe and healthy environment for study and work. Because some health and safety circumstances are beyond our control, we ask that you become familiar with the SIUC Emergency Response Plan and Building Emergency Response Team (BERT) program. Emergency response information is available on posters in buildings on campus, available on the BERT’s website at [www.bert.siu.edu](http://www.bert.siu.edu), Department of Public Safety’s website [www.dps.siu.edu](http://www.dps.siu.edu) (disaster drop down) and in the Emergency Response Guidelines pamphlet. Know how to respond to each type of emergency.

Instructors will provide guidance and direction to students in the classroom in the event of an emergency affecting your location. **It is important that you follow these instructions and stay with your instructor during an evacuation or sheltering emergency.** The Building Emergency Response Team will provide assistance to your instructor in evacuating the building or sheltering within the facility.
EVALUATION UNIT

GUIDELINES

Overview

You are to develop an Evaluation Unit. The Unit should consist of a comprehensive plan and detailed procedures that would be used to evaluate a training program of your choice. You are not required to implement your plan and evaluate the program. However, you are strongly encouraged to choose a “real” and “existing” training program upon which to base your Unit.

The evaluation model presented in this class (Phillips 5 Level Model) will be the model you will use to develop your Evaluation Unit. It is important to remember that this model is not applicable to all types of programs. The model is best applied to training programs delivered within a for-profit organization for the purpose of improving worker job performance. Examples of such programs include sales training, customer service training, machine-tool/operator training, safety training, and other types of training which result in a quantifiable improvement in productivity and/or profitability. Therefore, choose the training program you wish to base your Evaluation Unit carefully, as you may have difficulty applying this model to community service or education programs in which direct monetary benefits from the program are difficult to quantify.

Your Evaluation Unit must include the following major sections shown on the following pages. Read the instructions for each section carefully and contact your instructor if you need assistance. Keep in mind that points may be lost if you fail to provide the appropriate information.

MAJOR SECTIONS OF THE EVALUATION UNIT

Cover Sheet

The Unit must begin with a cover sheet which includes the title of your Evaluation Unit, your name, course name and number, instructor’s name, and the date Unit was submitted to your instructor.
Introduction
In 1-2 pages, describe the training program that will serve as the basis of your Unit. Specifically, you should include the following subsections:

1. The Purpose and Objectives of the Program – provide an overview of what the participants in the program will learn in program.
2. Purpose of the Evaluation – describe what you want to determine through your evaluation
3. Where/How the Program will be Conducted – describe how the program is delivered and the students who participate in the program.

Budget and Time Line
Utilizing the information discussed in class and found in Chapter 13 of your text, develop a comprehensive budget which includes all of the estimated costs associated with the program. Included with the budget should be an estimated timeline that shows when the costs are expected to be incurred.

Evaluation of Reaction & Planned Action
Begin this section with a narrative (3 pages max.) explaining the procedures that will be used to assess the participants’ reactions to the program and how they plan to apply the information learned. Explain when the data will be collected and the methods/instruments that will be used to gather the data. Describe the method in which the data will be analyzed. Include a copy of the instruments that you have obtained or developed to gather this data.

In summary, to guide you in the development of this sub-section of your unit, below is a list of those topics that you should include and discuss:

- The evaluation design
- Data collection methods
- Procedures used to develop instruments
- Data analysis procedures
- A copy of the instrument

Evaluation of Learning
Begin this section with a narrative (3 pages max.) explaining the procedures that will be used to evaluate the participants’ level of knowledge after participating in the program. Explain when the data will be collected and the methods/instruments that will be used to gather the data. Describe the method in which the data will be analyzed. Include a copy of the instruments that you have obtained or developed to gather this data.
In summary, to guide you in the development of this sub-section of your unit, below is a list of those topics that you should include and discuss:

- The evaluation design
- Procedures used to develop achievement test
- Simple item analysis procedures
- Methods to establish validity and reliability
- Performance assessment procedures
- Percentage of rater agreement procedures
- Data analysis procedures
- Copy of the achievement test
- Copy of the process/product checklist

**Evaluation of Application**

Begin this section with a narrative (3 pages max.) explaining the procedures that will be used to evaluate the participants’ ability to apply the knowledge gained after participating in the program back on the job. Explain when the data will be collected and the methods/instruments that will be used to gather the data. Describe the method in which the data will be analyzed. Include a copy of the instruments that you have obtained or developed to gather this data.

In summary, to guide you in the development of this sub-section of your unit, below is a list of those topics that you should include and discuss:

- The evaluation design
- Data collection methods
- Data analysis procedures
- Copy of the process/product checklist
Evaluation of Business Results
Begin this section with a narrative (3 pages max.) explaining the procedures that will be used to evaluate the impact that the program has had on the functioning of the organization. Explain when the data will be collected and the methods/instruments that will be used to gather the data. Describe the method in which the data will be analyzed. Include a copy of the instruments that you have obtained or developed to gather this data.

In summary, to guide you in the development of this sub-section of your unit, below is a list of those topics that you should include and discuss:

- Procedures to identify extraneous variables
- Procedures to identify performance indicators
- Procedures to conduct trend-line analysis

Return on Investment
Begin this section with a narrative (3 pages max.) explaining the procedures that will be used to calculate the return on investment of the program. Explain what figures will be used in the calculation, how the figures will be derived, and how ROI will be computed at all levels in Phillips evaluation model.

In summary, to guide you in the development of this sub-section of your unit, below is a list of those topics that you should include and discuss:

- Procedures to convert to monetary benefit
- Procedures to calculate ROI/CBR