

## **HRD 313: Program and Organizational Evaluation**

Human Resources Design Program  
Claremont Graduate University  
Spring, 2009, Modules 1 and 2  
Saturday, 9am-11:50am

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### **Course Description:**

Welcome to Program and Organizational Evaluation! The general purpose of this course is to enable you to see how the overall effectiveness of organizations and the HRD programs within these organizations can be defined and determined. Participants will develop skills in: forming good evaluation questions; designing evaluations and selecting samples; planning for data collection and developing effective measures; analyzing evaluation results; developing evaluation budgets; reporting and communicating evaluation results to stakeholders; and developing sensitivities to ethical and political issues involved in evaluation. Students will develop their evaluation skills through in-class discussions and activities, and out-of-class assignments.

### **Required texts:**

- Russ-Eft, D. & Preskill, H.(2001). Evaluation in organizations: A systematic approach to enhancing learning, performance, and change. Basic Books.
- Edwards, J., Scott, J., & Raju, N. (2003). The human resources program-evaluation handbook. Sage Publications

**Course Requirements:** Course evaluation will be based on a number of different elements described briefly below.

Three HR Evaluation Relevance Papers: In these papers, students will have the opportunity to reflect on how the material in the Edwards et al. text relates or does not relate to evaluations in their organizational setting. These papers should NOT just summarize what you read. The intent of these papers is to demonstrate mastery of the text content but also *reflect on and apply* the material in the Edwards text to your own work settings. Each paper should be approximately 2 pages in length. The focus of each paper is as follows:

HR Relevance Paper 1 – Training Evaluation

HR Relevance Paper 2 – Teams and Organizational Effectiveness Evaluation

HR Relevance Paper 3 – Evaluating Diversity Programs and Global HR Measures

For one of these papers, you may choose an alternative focus from the Edwards text, relating to another area of HR evaluation. This will allow you to select an area that might be of interest to you that is not assigned. So, for example, if you are more interested in Staffing, then you would read the chapters in the Edwards text on staffing and reflect on that, for one of the HR Relevance Papers. You still should read all the assigned Edwards material, however.

**Team Evaluation Plan:** In teams of 2-3, you will be required to develop an evaluation plan for an existing organizational or community program. This project will include several different elements: (*Guidelines for each of these assignments are described at the end of this syllabus*):

- Evaluation Plan Paper 1 – Focusing the Evaluation, Evaluation Design and Sampling
- Evaluation Plan Paper 2 - Data Collection & Analysis, Budget, Communication and Utilization
- Evaluation Plan Team Presentation

**Class Participation and Contribution:** Students will be involved in a series of in-class activities designed to assist participants in developing their evaluation plans and program evaluation skills. Class participation includes active participation in each of these activities. In addition, participants will be involved in discussions assessing the relevance of suggested evaluation techniques to their organizational settings. Students will also be involved in class sharing sessions around their HR Relevance Summaries. Students should read weekly assigned readings *before* each class, thoughtfully process the information, and be ready to contribute to class discussion. Class participation also involves careful attention to other students' presentations and offering of constructive comments and feedback. Additionally, class participation includes regular and punctual class attendance, which will also be considered in your class participation assessment. Please note the MSHRD program policy regarding attendance for the standard semester course states: *No more than TWO classes should be missed to receive credit for a course.*

**Grading:**

- Team Evaluation Plan Paper 1 35 points
- Team Evaluation Plan Paper 2 50 points
- Team Evaluation Plan Presentation 40 points
- HR Evaluation Relevance Summaries 45 points  
(Three summaries @ 15 points each)
- Class participation 30 points

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200 points

%	Points	Grade
100	200	A+
94-99	188-199	A
90-93	180-187	A-
87-89	174-179	B+
84-86	168-173	B
80-83	160-167	B-
77-79	154-159	C+

## **Course Policies:**

Necessary accommodations: Any student who has a disability that prevents the fullest expression of his or her abilities should contact the instructor as soon as possible to discuss the appropriate accommodations necessary to complete the course requirements.

Professional standards: The written products and verbal presentation you complete in this course should be regarded as an extension of your professional self and should reflect the best of your abilities. It is assumed that written reports will be neat, well-organized, well-written, and without noticeable grammatical, punctuation, or other writing errors. If needed, *the Writing Center* on campus can be of assistance. Presentations should be professional, incorporating effective presentation skills and the use of accompanying visuals as needed. All assignment deadlines should be adhered to.

## Course Schedule

Week	Topics	Readings Due	Assignments Due
1 1/24/2009	Overview of Program Evaluation	R/P: 1 & 2 E: 1 (pp. 3-14)	
2 1/31/2009	Focusing an Evaluation	R/P: 5 E: 3	
3 2/7/2009	Selecting Evaluation Designs	R/P: 6	
4 2/14/2009	Evaluating Learning, Performance and Change Initiatives & Training Evaluation	R/P: 3 E: 11, 12, 13	HR Relevance Paper #1 on Training Evaluation
5 2/21/2009	Choosing Data Collection Methods & Sampling	R/P: 7, 11	
6 2/28/2009	Surveys	R/P: 9	Evaluation Plan Paper 1  Bring in sample survey from your work setting.
7 3/7/2009	Individual and Focus Group Interviews	R/P: 10	
8 3/14/2009	Observation and Archival Data & Teams/Organizational Effectiveness Evaluation	R/P: 8 E: 14, 16	HR Relevance Paper #2 on Team/Organizational Effectiveness Evaluation
3/21/2009	Spring Break – <b>No Class</b>		
9 3/28/2009	Analyzing <i>Quantitative</i> Evaluation Data & Budgeting & Dealing with Budget, Time, and Data Constraints	R/P: 12 (pp. 313-318; 327-343), 14	Bring in any relevant information you will need to develop your evaluation budget.
10 <b>4/6/2009</b> <b>7-9:50pm</b>	Analyzing <i>Qualitative</i> Evaluation Data	R/P: 12 (pp. 318-326)	Bring in three copies of a brief (10-15 minutes) transcribed interview that you conducted with someone (you may

			disguise names, if needed.)
11 4/18/2009	Communicating and Reporting Evaluation Activities and Findings & Evaluating Diversity Programs and Global HR Measures	R/P: 13 E: 17, 24	HR Relevance Paper #3 on Evaluating Diversity Programs and Global HR Measures
12 <b>4/20/2009</b> <b>7-9:50pm</b>	Dealing with Interpersonal, Ethical, and Political Constraints	R/P: 4	
13 5/2/2009	Strategies for Evaluating and Implementing the Evaluation	R/P: 15, 16 E: 25	Evaluation Plan Paper 2
14 5/9/2009	Team Presentations and Final Reflections		Team Presentations

## Guidelines for the Team Evaluation Plan Project

*Please read through this guideline sheet thoroughly.* Teams of 2-3 individuals should be formed to complete this project. The purpose of this assignment is to give you the opportunity to function as program evaluators, applying the theories and methods we have discussed in class in developing an evaluation plan for a program in an organizational setting. Only one paper per team is required.

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### **EVALUATION PLAN PAPER I - Due: 2/28/2009.**

#### *Focusing the Evaluation and Design and Sampling*

- **Evaluation rationale:** Describe why the evaluation is being conducted - the factors that have led to the need or interest in the evaluation. (See R/P text for sample rationales.)
- **Purpose:** Describe the purpose of the evaluation. You might want to start with the sentence, “The purpose of this evaluation is to...” (limit to 3-4 sentences)
- **Key stakeholders:** Describe both the target audience and stakeholders, and how you propose to involve stakeholders in the evaluation.
- **Major type of evaluation:** Describe what kind of evaluation this will represent (developmental, formative, summative, performance monitoring, etc.).
- **Evaluation model:** Describe what evaluation model you will use (for example, goal-free, organizational learning, empowerment, behavioral objectives, utilization-focused, and so on).
- **Evaluation questions:** Number and list the questions that the evaluation will seek to answer. Remember that these questions form the boundaries and scope of the evaluation effort. They should be open-ended, general, and broad questions; NOT survey or interview questions. If you get stuck, remember to ask yourself: “What do I really want to know or learn from this evaluation?”
- **Evaluation design:** Describe the evaluation’s design. Is it primarily a naturalistic, qualitative, ethnographic case study, or a more quasi-experimental/experimental design? If so, what type of quasi or experimental design do you suggest? Explain why you’ve chosen this particular approach to answering the evaluation’s key questions.
- **Sampling strategy:** How you will select the sample - what sampling procedures will you use?

<u>Evaluation Plan Paper 1 Rubric</u> (Worth 35 points)					
	<b>Insufficient</b> (absent, lacking or incomplete) <b>1 pt.</b>	<b>Needs Improvement</b> <b>2 pts.</b>	<b>Adequate</b> <b>3 pts.</b>	<b>Very Good</b> <b>4 pts.</b>	<b>Exemplary</b> <b>5 pts.</b>
<b><i>Content Component</i></b>					
Evaluation Rationale/Purpose					

Statement					
Stakeholders/ How Will be Involved					
Evaluation Type & Model					
Evaluation Questions					
Evaluation Design					
Sampling Strategy					
<i>Style Component</i>					
Organization/Writing Style/Mechanics					

## EVALUATION PLAN PAPER 2 - Due: 5/2/2009

### *Method, Data Analysis & Budget*

- Specific data collection methods: Describe each of the specific data collection methods you propose to use to collect data in your evaluation plan, and why. You should include two different types of data collection methods – one quantitative method, and one qualitative method.
- Drafts of instruments: Provide good, well-written drafts of each data collection instrument you will use in the evaluation study (for example, interview or focus group guides or protocols, surveys, tests, or observation recording forms). You **MUST** prepare one instrument that will collect quantitative data (e.g., Likert scale survey), and one instrument that will collect qualitative data (e.g., focus group protocol, interview question guide).
- Validity: For each method, explain how you will ensure the validity of your instruments and the resulting data (for example, triangulation, pilot-testing, member checks).
- Data Analysis Plan: Describe how you would analyze the data you will collect from each of your proposed methods. Be specific and refer to how you will handle the data collected from each of your instruments.
- Measurement Chart: Prepare a measurement chart, which clearly specifies in a table format the following information – specific data collection method, items on instrument, analysis strategies. A sample format is provided at the end of this syllabus.
- Budget: Include an itemized budget necessary to complete the evaluation study. This is just a ballpark figure, so just go ahead and make a reasonable estimate.

### *Communicating and Reporting*

- Communication Plan: Identify the **target audiences** or *who* will receive communications about the evaluation as it progresses, as well as who will receive the evaluation results. Also, specify the **communication format** or method in which the information will be provided to each specific target audience. In other words, *how* will you communicate with each target audience?
- Utilization: Discuss ways in which you might work to ensure that the evaluation results are used.

<u>Evaluation Plan Paper 2 Rubric (Worth 50 points)</u>					
	<b>Insufficient</b> (absent, lacking or incomplete) <b>1 pt.</b>	<b>Needs Improvement</b> <b>2 pts.</b>	<b>Adequate</b> <b>3 pts.</b>	<b>Very Good</b> <b>4 pts.</b>	<b>Exemplary</b> <b>5 pts.</b>
<b><i>Content Component</i></b>					
Data Collection Methods					
Quantitative Instrument					
Qualitative Instrument					
Validity					
Data Analysis Plan					
Measurement Chart					
Budget					
Communication Plan: Target Audience/Format					
Utilization Plan					
<b><i>Style Component</i></b>					
Organization/Writing Style/Mechanics					

## **TEAM EVALUATION PLAN PRESENTATION**

*Prepare a 20-30 minute oral presentation* in which your team will share your evaluation plan with colleagues in our class, and any invited program partners your team would like to have present. The presentation should include all of the following elements:

- ✓ Begin with a brief background of the program you are proposing to evaluate.
- ✓ Describe the theoretical model that your team will use in guiding this evaluation.
- ✓ Describe the overall purpose of the evaluation, and the specific evaluation questions you will pursue in the evaluation study.
- ✓ Describe the evaluation (research) design that will be used, and the sampling strategy.
- ✓ Describe the data collection methods that will be used, how these methods link back to the original evaluation questions, and how the data will be analyzed.
- ✓ Describe any political, ethical or interpersonal issues that you feel need to be addressed to guarantee a successful evaluation study.
- ✓ Describe who you will need to communicate with regularly during the evaluation and after the results have been analyzed. How will you communicate with these individuals?

- ✓ Share your ideas on how you can ensure that results (or recommendations) from your evaluation study are actually used in a productive fashion to improve the program under study.
- ✓ Elicit feedback from your presentation audience on ways to improve your evaluation plan.

**Bring to class on the day of the presentation:**

- ✓ Prepare print-outs of presentation slides (print out in handout format, 3 slides per page) to give to Dr. Nemiro on the day of your presentation.
- ✓ Make enough copies of your Powerpoint slides so that each class member may also have a copy. (Print out in handout format, 6 slides per page).

**Presentation TIPS:**

- ✓ Each team's presentation should be at least 20 minutes and NO MORE than 30 minutes (TIP, *rehearse and time your presentation* ahead of time; you will not be able to go over the time limit).
- ✓ The presentation should include professional-looking Powerpoint slides.
- ✓ Your verbal delivery should be engaging. You should speak directly to the audience and avoid directly reading from notes or slides.

*PLEASE NOTE: All team members should be actively involved in the presentation. You may delegate responsibilities but everyone on the team should have something to present.*

<u>Evaluation Plan Presentation Rubric (Worth 40 points)</u>					
	<b>Insufficient</b> (absent, lacking or incomplete) <b>1 pt.</b>	<b>Needs Improvement</b> <b>2 pts.</b>	<b>Adequate</b> <b>3 pts.</b>	<b>Very Good</b> <b>4 pts.</b>	<b>Exemplary</b> <b>5 pts.</b>
<b><i>Content Component</i></b>					
Focus of Evaluation – program introduction, model, purpose, evaluation questions					
Evaluation design and sampling strategy					
Data collection and analysis plans					
Political, ethical, and interpersonal					

concerns					
Communication and utilization plans					
<b><i>Presentation Skills</i></b>					
Presenters' styles/ roles (verbal and nonverbal skill in presentation; evident teamwork, collaboration and practice in presentation)					
Graphics (quality, appropriateness, and added value of audio-visuals)					
Class discussion (ability to effectively engage audience and reflect on and answer participants questions and feedback effectively)					

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## Sample Measurement Chart

Evaluation Questions
Data Collection Methods
Items on Instrument
Analysis Strategies

<u>Evaluation Question #1</u>			
<p>How well did participants of HRD 313 understand the content of the course?</p> <ul style="list-style-type: none"> <li>• Focusing an Evaluation</li> <li>• Evaluation Design and Sampling</li> <li>• Data Collection</li> <li>• Data Analysis</li> <li>• Politics and Ethics</li> <li>• Communicating and Reporting</li> </ul>	<p>Course Exams 1 and 2 (Note - just an idea, don't worry we do not have exams in this class ☺)</p>	<ul style="list-style-type: none"> <li>• Focusing an Evaluation (Exam 1, items 1-20)</li> <li>• Evaluation Design and Sampling (Exam 1, items 20-60)</li> <li>• Data Collection (Exam 2, items 1-15)</li> <li>• Data Analysis (Exam 2, items 16-30)</li> <li>• Politics and Ethics (Exam 2, items 31-40)</li> <li>• Communicating and Reporting (Exam 2, items 41-60)</li> </ul>	<ul style="list-style-type: none"> <li>✓ Mean class averages for each topic</li> <li>✓ Frequencies of incorrectly answered questions within a specific topic</li> </ul>
	<p>Focus groups with students</p>	<p>Protocol question #1 "If you were hired to design and implement a professional evaluation study, to what degree would you feel capable of doing the following?"</p> <ul style="list-style-type: none"> <li>✓ Formulating a purpose and key questions to guide the study</li> <li>✓ Select an appropriate evaluation design and sampling strategy</li> <li>✓ Select and implement appropriate data collection methods</li> <li>✓ Select and implement appropriate data analysis techniques</li> <li>✓ Be able to anticipate, identify and deal with any ethical or political issues that may arise.</li> <li>✓ Communicate and report evaluation activities and findings with stakeholders.</li> </ul>	<p>Qualitative data analysis of focus group transcripts and notes</p>
	<p>Survey assessments filled out by organizational or community partners, evaluating the students' evaluation plan</p>	<p>Item #1- Please rate the degree to which you are satisfied with each of the areas listed below in the evaluation plan presented to you by the student evaluation team:</p> <ul style="list-style-type: none"> <li>✓ Evaluation Questions</li> <li>✓ Evaluation Design</li> </ul>	<ul style="list-style-type: none"> <li>✓ Individual team ratings for each topic</li> <li>✓ Mean ratings for class on each topic</li> </ul>

		<ul style="list-style-type: none"><li>✓ Sampling Strategy</li><li>✓ Data Collection Instruments</li><li>✓ Data Analysis Strategies</li><li>✓ Plan for Communication and Reporting of Findings</li></ul>	
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