



The Full Scoop on Full-Scope Evaluation

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What is this thing called full-scope evaluation? What makes it different from just plain evaluation? Why is there a chapter devoted to full-scope evaluation in this handbook on human performance technology (HPT)? Is it something you ought to do?

The authors of this chapter believe that evaluation is more than a separate process box at the end of the HPT model; that is why we added relationship arrows when we expanded the model for *Fundamentals of Performance Technology* in 2000 and revised the arrows in the 2004 second edition (Figure 14.1). The arrows indicate that evaluation is, or should be, an integral and integrated part of the performance-improvement process; it should take place during all HPT processes: performance and cause analyses, intervention selection and design, and implementation and change.

This chapter will give you the full scoop on full-scope evaluation and will describe how you can integrate full-scope evaluation into the HPT process. So read on, and then make up your own mind whether you want to “do” full-scope evaluation.

WHAT EVALUATION IS; WHAT IT IS NOT

Evaluation wears many faces. It is integral to every aspect of life. Consider these examples: I visit my local grocery store to purchase Bing cherries. I take handfuls of cherries, but prior to placing them in a sack, I separate them. I look for

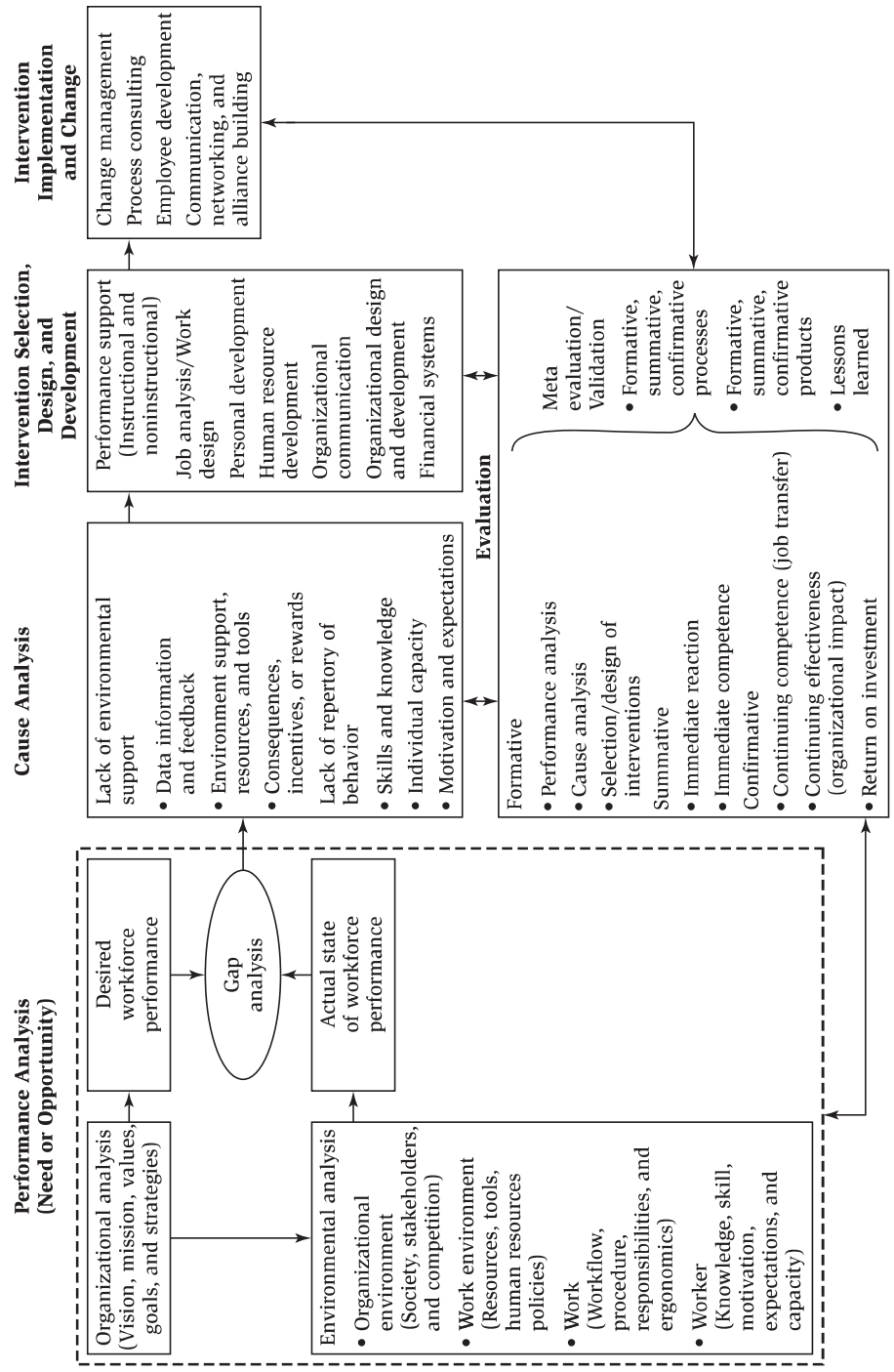


Figure 14.1. ISPI Human Performance Technology Model.

Source: Van Tiem, Moseley, and Dessinger, 2004, p. 3. Used with permission.

firmness, remove those that are blemished, and may even taste a few in the process. I then move to the meat counter to purchase steaks. My choices may include select choice or prime-grade quality, wet or dry-aged method, or varying amounts of marbling, and, if I really know my steaks, I may also consider the feed type, since corn creates buttery fattiness whereas grass yields a leaner steak.

I then go home and, while grilling my steak and eating a few cherries, I watch the Olympic Games. I form my judgment about a particular athlete's success. Then professional judges render their scores based on technical accuracy and aesthetics. The higher the score, the more likely the athlete will secure a place in the limelight.

In these three examples I have unconsciously and subjectively evaluated cherries, steaks, and an athlete. I have even made my judgments against a real set of criteria.

Evaluation in professional settings is similar to the evaluation choices we make on a daily basis. The evaluator renders a judgment of value or worth against a set of specific criteria. The evaluation is subjective; however, it is made more solid because we add measurement. For example, we may say that 93 percent of the participants agree that instructional objective number four gives them a good review of the history of evaluation or that thirty-six of the fifty participants feel confident that given a performance-support tool they could transfer a procedure to their job. Similarly, we need to evaluate individual performance, competence, organizational impact, and so forth in the business world not only by describing situations but also by comparing variables, predicting relationships, and showing significance, using evaluation that is peppered with robust measurement.

When we think about evaluation we often reflect upon accountability issues, all levels and kinds of objectives, budgeting priorities and constraints, pre- and post-performance and other testing, and the like. There is the tendency to equate these elements with evaluation. Beware! In themselves, they are not evaluation; however, all evaluation has elements of objectives, testing, budgeting, and accountability.

MILESTONES IN THE EVOLUTION OF EVALUATION PRACTICE

There are many milestones in the history of evaluation that reflect the social trends of the time: testing movement in schools, heavy reliance on measurement, experts relying on social science methodologies, creation of professional associations, development of standards and codes of conduct, competition in the United States precipitated by the space race accomplishments of the then Soviet Union, globalization of evaluation, and other pivotal benchmarks. It is not the purpose here to reflect upon these milestones; however, it is safe to say

these activities influenced current evaluation theory and sound practice (Fitzpatrick, Sanders, and Worthen, 2004).

A seminal work in program evaluation is *Standards for Evaluations of Educational Programs, Projects, and Materials* by the Joint Committee on Standards for Educational Evaluation (1981). The standards focused on K–12 schools, and in 1994 they were expanded to include other settings as well. “The Joint Committee *Standards* is a set of thirty standards, each with an overview that provides definitions and a rationale for the standard, a list of guidelines, common errors, illustrative cases describing evaluation practices that could have been guided by that particular standard, and an analysis of each case” (Fitzpatrick, Sanders, and Worthen, 2004, p. 444). The quality of an evaluation study is judged by utility, feasibility, propriety, and accuracy.

Another pivotal benchmark that has influenced professional evaluation is the set of principles developed by the American Evaluation Association (AEA). The AEA guiding principles promote systematic inquiry about all aspects of evaluation, competence of evaluators, honesty and integrity of the evaluation process, respect for all stakeholders, and societal concerns focusing on diverse interests and values. HPT organizations have stepped up to the plate with their guiding principles, standards, and codes of conduct for all HPT processes, including evaluation; for example, the International Society for Performance Improvement (ISPI) and the American Society for Training and Development (ASTD) both have certification programs for performance technologists that include standards and codes of ethics (Van Tiem, Moseley, and Dessinger, 2004; American Society for Training and Development, 2005).

The individual who has contributed most to past and present evaluation thought and practice is Michael Scriven. Scriven coined the terms *formative evaluation* and *summative evaluation*. He provided several product-evaluation checklists that have shaped the consumer-oriented evaluation approaches over the years. Scriven also challenged our perspective with goal-free evaluation (Scriven, 1967). His current efforts in evaluation continue to guide and focus evaluation theory and practice.

Two individuals who are influencing the current practice of evaluation in the training and development and human performance technology fields are Jack Phillips and Carl Binder. Phillips extends the Kirkpatrick levels discussed later in this chapter by adding a fifth level called “return on investment” (ROI). This level takes a hard look at the monetary value of the results and costs for a program (Phillips, 1991). Binder, a frequent contributor to the ISPI publications *Performance Improvement* and *PerformanceXpress*, encourages human performance practitioners to employ sound evaluation practice and robust measurement. He sounds the alarm and cautions us that the survival of HPT means we need to plan for effective measurement because that is what drives business results (Binder, 2002).

There are a variety of pivotal monograph resources on formative and summative evaluation. However, there is only one resource on confirmative evaluation that addresses continuing efficiency, effectiveness, sustainability, value, and alignment: *Confirmative Evaluation: Practical Strategies for Valuing Continuous Improvement* (Dessinger and Moseley, 2003). Evaluators need to seamlessly add confirmative evaluation to their repertoire of knowledge and skills. Dessinger and Moseley's book is an on-the-job guide for planning and conducting confirmative evaluation to evaluate performance-improvement interventions three to twelve months after implementation.

EVALUATION MODELS

Evaluation models are blueprints for guiding and making evaluation decisions. Many of the models that are often applied within the HPT framework actually come from the Educational Technology (ET) or Instructional Systems Development (ISD) arenas and may be adapted to both training and nontraining interventions by creative HPT practitioners. The HPT practitioner benefits from a general understanding of the various models reported here along with an eclectic approach to their use and value.

Curriculum Evaluation Models

The literature reports a variety of curriculum evaluation models. Tyler, Provus, Hammond, Papham, Taba, Bloom, and others have followed the "straightforward procedure of letting the achievement of objectives determine success or failure and justify improvements, maintenance, or termination of program activities" (Fitzpatrick, Sanders, and Worthen, 2004, p. 80). Scriven and Komoski support a consumer-oriented approach using varieties of criterion checklists and product testing to address the consumer information needs of audiences, sponsors, clients, and stakeholders (Fitzpatrick, Sanders, and Worthen, 2004, pp. 100–111). Eisner suggests expertise evaluation where professional judgments of quality are required. Individuals such as Stake, Patton, Guba, Lincoln, and so on are participant-oriented, use a pluralistic approach, and are concerned with description, judgment, and context (Fitzpatrick, Sanders, and Worthen, 2004, pp. 129–151).

Training Evaluation Models

The literature also reports a variety of training evaluation models. The granddaddy of all is the Kirkpatrick Model. Kirkpatrick focuses on four levels of evaluation: level 1, participant reaction; level 2, participant learning; level 3, on-the-job change in behavior; and level 4, final results of the training

(Kirkpatrick, 1994). Kirkpatrick is referenced by Hale (2004) and other HPT practitioners in terms of evaluating both training and nontraining performance-improvement interventions.

Other models, such as the CIRO Model, Hierarchy Model, Bell System Model, Contingency Model, Behavioral Science Model, Xerox Model, IBM Evaluation Model, and Saratoga Institute Model, are rooted in Kirkpatrick's four levels. For more information on these models, see Moseley and Dessinger (1998, pp. 233–260).

Eclectic Models

There are models that are more eclectic and flexible in their approach to evaluation. They can be used both in training evaluation and in human performance technology evaluation. The Kaufman, Keller, Watkins Model suggests a five-level approach to interventions: level 1, inputs such as human, physical, and financial resources and reactions such as perceived acceptability and efficiency of methods, means, and processes; level 2, acquisition, mastery, and competence; level 3, application or utilization within the organization; level 4, organizational results; and level 5, societal outcomes focusing on client responsiveness, contributions, and payoffs (Van Tiem, Moseley, and Dessinger, 2004).

Brinkerhoff's Six-Stage Model evaluates needs and goals that trigger an intervention; the design that addresses responsiveness to needs and goals; operation or the installation and implementation of an intervention in relation to the needs and design; the learning that takes place when interventions are first used; the endurance and sustainability of the intervention over time; and the payoff or the return on investment from the successfully implemented interventions (Van Tiem, Moseley, and Dessinger, 2004).

Stufflebeam's CIPP Model delineates context or planning, input or structuring, process or implementing, and product or recycling. CIPP is a comprehensive approach to evaluating at all stages of program development (Fitzpatrick, Sanders, and Worthen, 2004).

Full-Scope Evaluation: A Timely New Model

Unlike the models discussed previously, the Dessinger-Moseley Full-Scope Evaluation Model illustrates the benefits of integrating two processes, performance improvement and evaluation, in one iterative flow. The model blends formative, summative, confirmative, and meta evaluation into a seamless, iterative flow for making judgments about the continuing merit and worth of any performance-improvement intervention. Then the HPT practitioner skillfully diverts the flow into the mainstream HPT process, where it becomes part of, rather than a branch off of, the HPT process flow. The real scoop is that full-scope evaluation can be as deep and as wide as you and your stakeholders agree that it needs to be.

FULL-SCOPE EVALUATION: AN OVERVIEW

One way to gain perspective on full-scope evaluation is to zoom out to view full-scope evaluation in its entirety, and then zoom in on each of the four components and their foci. Zooming out gives us a holistic view or the full scoop; zooming in reveals the details.

Zooming Out: Definition, Purpose, and a Model

Since we first began to talk and write about full-scope evaluation, we have tried to develop a model that graphically reveals its iterative nature (Moseley and Dessinger, 1998) and establishes the purpose of full-scope evaluation through the use of foci: what each type of evaluation focuses on throughout its life cycle. The latest model (Figure 14.2) uses concentric circles and the concept of “foci” to illustrate how full-scope evaluation may be integrated into the HPT process. If it were feasible to do so on paper, we would set each circle spinning to intensify

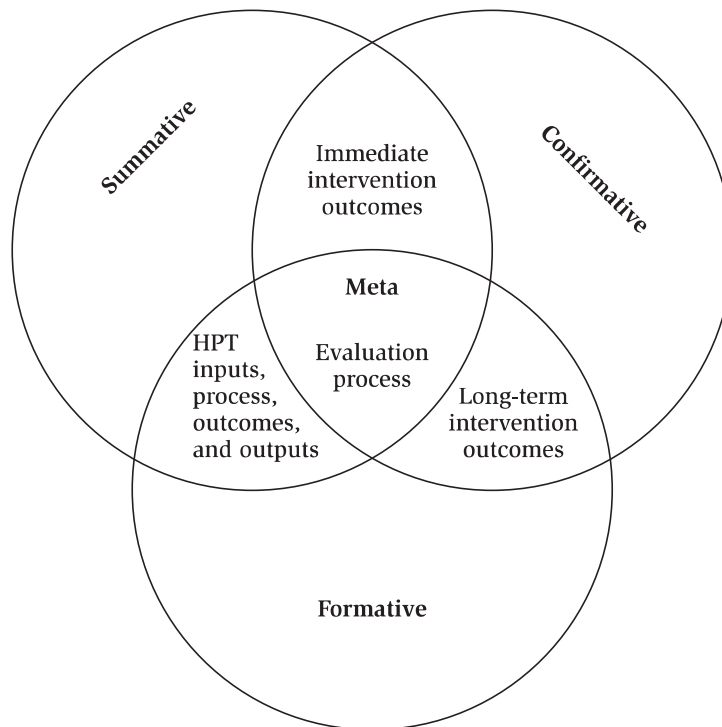


Figure 14.2. The Dessinger-Moseley Full-Scope Evaluation Model.

the concept of evaluation as spiraling concentric circles of activities that are always pulling in and sending out new information.

The Dessinger-Moseley Full-Scope Evaluation Model provides a holistic view of full-scope evaluation as it applies to the HPT process. The concentric circles illustrate the iterative relationship among the four types of evaluation, and the overlaps suggest that integrating evaluation throughout the HPT process makes it possible to focus on the full range of performance improvement: inputs, processes, outputs, and outcomes.

Within the overlaps are the foci of each type of evaluation. Beginning with the overlap between formative and summative evaluation, the model identifies the following foci:

- Formative evaluation focuses on the HPT processes of performance, gap, and cause analysis; intervention selection, design, development, and implementation and change; and the process outputs and outcomes.
- Summative evaluation focuses on immediate intervention outcomes, such as reaction, accomplishment, and immediate impact.
- Confirmative evaluation focuses on the long-term intervention outcomes of efficiency, effectiveness, impact, and value.
- Meta evaluation focuses on attributes of the evaluation process itself, such as validity, reliability, and accountability.

Zooming In: The Components of Full-Scope Evaluation

The four types of evaluation that make up full-scope evaluation are delineated by their purpose and timing. Table 14.1 illustrates the differences among the four types.

Formative Evaluation. Formative evaluation keeps us honest to ourselves and to the process right from the start. It judges the merit and worth of the processes we use to analyze, select, design, develop, and implement performance interventions, and the products or outcomes that result from the processes. For example, we formatively evaluate the design and development of a training program when we ask subject-matter experts to review the training materials for content completeness and accuracy or we pilot the training program with a sample audience to determine whether there are ambiguities in the content or presentation.

Summative Evaluation. Summative evaluation is the most familiar and most used type of evaluation. Using summative evaluation, we can judge how the participants and customers of the performance-improvement intervention felt about the intervention and the degree to which what we said would happen is

Table 14.1. Zooming In on the Components of Full-Scope Evaluation.

<i>Type</i>	<i>Focus or Purpose</i>	<i>Timing</i>
Formative	Improve performance intervention process and outputs	During analysis, selection, design, and development
Summative	Determine immediate user competency and immediate intervention effectiveness	During implementation and change
Confirmative	Determine continuing user competency and intervention effectiveness, efficiency, impact, and value	Three to twelve months after implementation of long-term intervention; that is, one year or more
Meta	Evaluate evaluation process and outputs	After confirmative evaluation is completed

Source: Adapted from Van Tiem, Moseley, and Dessinger, *Fundamentals of Performance Technology* (2004), p. 157. Used with permission.

really happening right now. Participant reaction surveys and knowledge or performance pre-post tests are examples of common summative evaluation tools.

Confirmative Evaluation. Confirmative evaluation is not just an “extension of summative evaluation” (see Table 14.1). Confirmative evaluation helps us go a step further and verify that what we said would happen has continued to happen after the intervention has been implemented for a year or more. The tools for gathering confirmative evaluation data include review of existing documentation such as formative and summative evaluation data, organizational impact data, and so forth; surveys; individual or group interviews; and observation. They also include more sophisticated techniques and tools such as ROI analysis.

Meta Evaluation. Meta evaluation also helps to keep us honest. We use it to evaluate how well we have been and are evaluating by judging the merit and worth of all our evaluation processes and products. Type 1 meta evaluation is concurrent, evaluate-as-you-go evaluation of the evaluation, and type 2 meta evaluation evaluates the evaluation after it is completed and focuses on whether the results are reliable and valid.

Zooming In: Full-Scope Evaluation Activities

There are seven major activities that contribute to any successful evaluation, including full-scope evaluation:

1. Plan the evaluation
2. Design and develop the materials
3. Collect the data
4. Analyze the data
5. Interpret the findings
6. Communicate the status of the evaluation activities and the findings, with recommendations for action
7. Document and archive information on the evaluation process and results

The activities that are most crucial to the success of full-scope evaluation are planning, communicating, documenting, and archiving the evaluation process and results.

Develop a Plan. Planning for full-scope evaluation is either proactive or reactive. Proactive planning takes place up front during the planning phase for the intervention. Reactive planning is the result of a trigger event that occurs during or after the intervention is implemented. Suddenly a stakeholder needs to measure the outcomes or prove the value of the intervention. In either case, planning should address and resolve the following issues:

- Who are the stakeholders for the evaluation? Who needs to know whether the intervention is successful?
- Why do the stakeholders need to know? To plan? Prove? Improve? Make decisions?
- What information do the stakeholders need to know to meet their needs?
- What evaluation objectives do we need to accomplish to meet stakeholder needs?
- What evaluation questions do we need to answer to meet stakeholder needs?
- What evaluation data do we need to collect to accomplish the evaluation objectives or answer the evaluation questions?
- What sources are required and available to provide the data we need?
- What resources such as people, technology, time, or money, are required and available to collect and analyze the data, and interpret and communicate the results?
- What data-collection techniques are most useful, given the evaluation objectives and the current context such as organizational culture, climate, and resources? Survey or questionnaire? Group or individual interview? Observation? Review of existing documents? Other . . . ?

- What analysis techniques are most useful, given the evaluation objectives or questions and the current context, such as organizational culture, climate, and resources? Informal analysis techniques may include focus groups, Delphi technique, Q Sort, and other qualitative techniques; formal analysis techniques may include frequency distributions, mean-mode-median, analysis of variance (ANOVA), multiple regression analysis, and other quantitative techniques.
- How and to whom should we communicate the results?
- How should we document and archive the evaluation processes and results so that they are useful for auditing this evaluation and guiding future evaluation efforts?

Planning is the most crucial activity for a successful full-scope evaluation because it establishes a strong foundation for why and how the evaluation will be conducted. Once the plan is in place, it is just a matter of using the plan as a road map for the remaining evaluation activities: collection, analysis, interpretation, communication, and documentation.

Communicate: Let Them Know You Are Still Around. Communicating the findings at each stage of full-scope evaluation is also crucial. Full-scope evaluation stays around longer than “regular” evaluation and requires long-term support from the organization and all the stakeholders. Provide information on the findings with recommendations for action so the stakeholders can use the information to make decisions related to performance improvement. If you are beginning to implement the next step in the evaluation plan, let everyone know when and why so they can arrange their schedules if necessary and begin to “think evaluation” again. There may be a gap of several weeks or even months between evaluations, and the stakeholders need to remain aware that evaluation is still an important part of the intervention process.

Document and Archive. Keeping accurate records and documenting what you are doing as well as what you have discovered throughout the evaluation is critical. Lessons learned may save time and money the next time around, may help to develop expertise in a novice HPT practitioner, and may even help you develop a business case for your next full-scope evaluation effort. The need for documenting and archiving both the evaluation process and the evaluation results is not as obvious as it sounds. Unless the organization has a good knowledge-management structure and practice in place or is affected by certification or regulatory standards, many stakeholders fail to see the usefulness of documenting and archiving information, and many practitioners skip this step.

THINKING INSIDE THE BOX

What makes full-scope evaluation work is that it is both iterative and integrated; the flow between types of evaluation is seamless, and, in most cases, it is better not to be “outside of the process box.” Tables 14.2, 14.3, and 14.4 provide suggestions for how to integrate full-scope evaluation into the HPT process. Table 14.2 suggests ways to integrate formative, summative, and confirmative evaluation into the analysis stage of the HPT process; Table 14.3 presents similar suggestions for the intervention selection, design, and development stage, and Table 14.4 describes what to do during intervention implementation and change. When evaluation is integrated into the HPT process, the evaluation stage is no longer a separate entity, so it is not represented in this table.

IMPLEMENTING FULL-SCOPE EVALUATION IN THE REAL WORLD

Car companies do it, chemical companies do it, companies dedicated to Six Sigma and other formal quality-improvement processes do it, and do it well. But, like Willy Loman, the protagonist in *Death of a Salesman*, those who do it feel they do not need to talk about it. Over the past six years we have asked close to 250 full-scope evaluation workshop participants the following question: Do you, your clients, or your organization do full-scope evaluation: formative, summative, confirmative, and meta? We have kept a tally of the replies, and Figure 14.3 shows how the replies spread over a continuum from Yes to Not Sure.

When pressed, even those who admit to “doing” full-scope evaluation do not like to provide specific case studies or discuss findings, or even share strategies. It is easier to document innovative formative or summative evaluation practices or Kirkpatrick’s Levels 1 through 4, which certainly contain elements of full-scope evaluation, or even ROI studies. Part of this reticence on the part of practitioners may stem from the sensitive nature of the data collected during a full-scope evaluation. It can definitely bare the

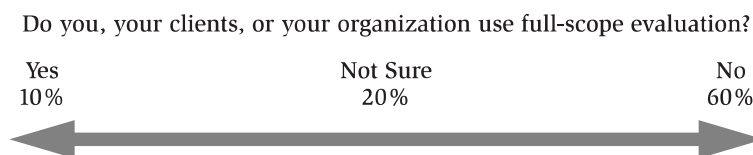


Figure 14.3. Continuum of Responses to the Full-Scope Evaluation Question.

Table 14.2. Integrating Full-Scope Evaluation into the Analysis Phase of the HPT Process.

<i>Formative Evaluation</i>	<i>Summative Evaluation</i>	<i>Confirmative Evaluation</i>	<i>Meta Evaluation</i>
Decide whether to conduct a formative evaluation:	Review the analysis outputs and outcomes to decide whether to conduct a summative evaluation:	Review analysis outputs and outcomes to decide whether to conduct confirmative evaluation:	Review analysis outputs and outcomes to decide whether to conduct meta evaluation:
<ul style="list-style-type: none"> Do the organization and stakeholders need information on the value of the HPT process? If yes, for what purpose? Does the organization have the resources for and desire to support formative evaluation? 	<ul style="list-style-type: none"> Do the organization and stakeholders need information on immediate outputs and outcomes? If yes, for what purpose? Does the organization have the resources for and desire to support summative evaluation? 	<ul style="list-style-type: none"> Is it a long-term intervention? Do the organization or stakeholders need to confirm long-term results? If yes, for what purpose? Does the organization have the resources for and desire to support confirmative evaluation? 	<ul style="list-style-type: none"> Are there certification, standards, licensing, or other external or internal accountability factors that require meta evaluation? Does the organization have the resources for and desire to support meta evaluation?
If yes, review the analysis inputs, process, outputs, and outcomes of the Analysis Phase to judge reliability, validity, and alignment with organization and stakeholder needs	If yes, gather information to align summative evaluation with organization and stakeholder needs	If yes, gather information to align confirmative evaluation with organization and stakeholder needs	<p><i>Type One:</i> monitor and evaluate the evaluation processes, outputs, and outcomes of this HPT phase</p> <p><i>Type Two:</i> monitor (collect, review, archive) the evaluation data from this phase for future evaluation</p>

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Table 14.3. Integrating Full-Scope Evaluation into the Intervention and Design Phase of the HPT Process.

<i>Formative Evaluation</i>	<i>Summative Evaluation</i>	<i>Confirmative Evaluation</i>	<i>Meta Evaluation</i>
Establish and monitor criteria for selecting and designing interventions	Design a summative evaluation plan for the intervention based on the analysis phase outputs and outcomes	Design a confirmative evaluation plan for the intervention	<i>Type One:</i> monitor and evaluate the evaluation processes, outputs, and outcomes for this HPT phase
Monitor and evaluate the selection, design, and development process	Develop the summative evaluation materials	Develop the first draft of the confirmative evaluation materials	<i>Type Two:</i> monitor, that is, collect, review, and archive the evaluation data from this phase
Monitor the alignment between analysis outputs, needs, objectives, and so on, and intervention selection, design, and development outputs	Design, develop, implement, and evaluate a pilot of the intervention	Monitor and collect the formative, summative, and meta evaluation data	
Plan and implement a stakeholder review, revise, and approve cycle for all the outputs of this phase			

Source: Joan Conway Dessinger, The Lake Group. Used with permission.

Table 14.4. Integrating Full-Scope Evaluation into the Implementation and Change Phase of the HPT Process.

<i>Formative Evaluation</i>	<i>Summative Evaluation</i>	<i>Confirmative Evaluation</i>	<i>Meta Evaluation</i>
<p>If this phase involves redesign of the intervention, repeat the formative evaluation activities from the HPT select, design, and develop phase to evaluate the redesign process and outputs</p>	<p>Implement summative evaluation and review the summative evaluation outputs and outcomes</p> <p>Report the results to the stakeholders with recommendations</p>	<p>If this is a long-term intervention:</p> <ul style="list-style-type: none"> • Implement confirmative evaluation three months to one year after implementation begins • Monitor, that is, collect, review, and archive, the evaluation data from this phase • Analyze results • Report findings to stakeholders, with recommendations • Revise confirmative evaluation materials if needed 	<p><i>Type One Evaluation:</i> monitor and evaluate the evaluation processes and outputs for this HPT phase and report findings to the stakeholders</p> <p><i>Type Two Evaluation:</i></p> <ul style="list-style-type: none"> • Monitor, that is, collect, review, and archive the evaluation data from this phase • When the intervention ends, evaluate all the formative, summative, and confirmative evaluation processes and outputs and report findings to the stakeholders

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soul of an organization, or at least of its performance-improvement activities. Getting approval from a large organization to release information on what could be considered part of the organization's strategic plan is often difficult and time consuming; that may also play a factor in the difficulty we have encountered over the years as we try to discover "real world cases" to include in presentations, articles, and books. Meanwhile, for those of you who want to "do" full-scope evaluation in your organizations, or at least add it to your repertoire of knowledge and skills, here are some tools for getting started.

Full-Scope Evaluation Toolkit for the HPT Practitioner

There are a number of books that will help HPT practitioners who need to add full-scope evaluation to their repertoire of knowledge and skills. Each of the resources blends theory with practical suggestions and performance-support tools for implementing evaluation. These books are listed after the reference list at the end of this chapter.

Another source of information is this handbook. Other chapters will provide information on and examples of how to use interviews, surveys, observation, data analysis, and other tools of the evaluation trade. Elsewhere in this book, our colleagues introduce the concept of appreciative inquiry. As appreciative inquiry becomes a useful and viable HPT intervention, you may decide to add it to your evaluation toolbox, along with participatory, stakeholder, and learning-oriented approaches to evaluation that all share similar assumptions, purposes, and methods (Coghlan, Preskill, and Catsambas, 2003).

Can You Get There from Here? The Future of Full-Scope Evaluation

Full-scope evaluation helps HPT practitioners conduct a major reality check on three important performance-improvement success factors: keeping the performance-improvement intervention aligned with organizational needs, adapting to change, and accomplishing the intended performance-improvement goals and objectives. Formative evaluation helps us focus on alignment and the intricacies of change management; summative and confirmative evaluation help us focus on accomplishments. Meta evaluation makes it possible for us to be accountable for the outputs and outcomes of our evaluation efforts.

Call to Action

Full-scope evaluation is not for the faint-hearted, but it is for HPT practitioners and clients who strongly believe in continuous improvement and accountability. So here is what HPT practitioners need to think, say, and do to make full-scope evaluation happen in the real world.

Make the Decision to Do Full-Scope Evaluation Based on Sound Analysis.

Remember, every intervention is different, and the scope may be more or less “full,” depending on the decision you make in the analysis phase (Table 14.2). For example, if on the one hand the intervention is a one-time-only event, you may want to do a partial full-scope evaluation with formative and summative components only. On the other hand, the one-time event may be very costly or have long-term outcomes that require confirmative evaluation in the future and may even need a meta evaluation to justify regulatory or certification requirements.

Exceptions to the Rule. Most full-scope evaluations are conducted for long-term interventions and are not used for one-time events. However, there are exceptions to the rule. As an example, an international pharmaceutical company, or Company Y, planned to close Plant X in the Deep South. To keep the plant going until the paperwork could catch up with the closure, the company sent manufacturing work orders to plant X that its other plants were too busy to fill. Lo and behold, Plant X did such an efficient and effective job manufacturing the product that Company Y decided not to close it down. Meanwhile, Company Y had implemented a team culture at all levels, and Plant X had not been part of the massive intervention implementation and change effort. So a decision was made to move the company’s annual meeting from New York City to Plant X’s small town and hire an outside training company to implement the team culture for Plant X at the same time as the annual company meeting. The costs were extremely high. They even involved remodeling the local motel. The company asked for a full-scope evaluation plan to justify their investment in this one-time event.

Accentuate the Positive. There are at least four benefits that HPT practitioners need to recognize, internalize, and disseminate to all stakeholders before they can make a business case for implementing full-scope evaluation. The benefits are that full-scope evaluation

- Establishes and verifies the continuing merit and worth of a performance intervention
- Provides a foundation for long-term planning, proving, improving, and making decisions
- Supports the need for accountability for performance improvement
- Models and supports continuous improvement

Eliminate the Negative. In addition to proving the case for full-scope evaluation, HPT practitioners need to eliminate the barriers to implementation. In the end, it is all about resources: time, money, and talent. If HPT practitioners

possess the knowledge, skills, and talent to plan full-scope evaluation activities that are both effective and efficient, save time and money, and produce recognized value-added results for the organization and the stakeholders, they can turn full-scope evaluation into a real-world part of HPT practice.

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Additional Resources

There are a number of additional resources not cited in this chapter that will help HPT practitioners who need to add full-scope evaluation to their repertoire of knowledge and skills. Here are our recommendations.

- Combs, W. L., and Falletta, S. V. (2000). *The targeted evaluation process: A consultant's guide to asking the right questions and getting the results you trust*. Alexandria, VA: American Society for Training and Development.
- Dessinger, J. C., and Moseley, J. L. (2004). *Confirmative evaluation: Practical strategies for verifying continuous improvement*. San Francisco: Jossey-Bass/Pfeiffer.
- Geis, G. L., and Smith, M. E. (1992). The function of evaluation. In H. D. Stolovitch and E. J. Keeps (Eds.), *Handbook of human performance technology: A comprehensive guide for analyzing and solving performance problems in organizations* (pp. 130–166). San Francisco: Jossey-Bass.
- Hale, J. (2002). Performance-based evaluation: Tools and techniques to measure the impact of training. San Francisco: Jossey-Bass/Pfeiffer.
- Mark, M. M., and Pines, E. (1995). Implications of continuous quality improvement for program evaluation and evaluators. *Evaluation Practice*, 16(2), 131–139.