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## ABSTRACT

This paper describes a relatively new approach to program evaluation, the "learning history" approach. The paper also presents preliminary results of a pilot test of the method and provides a preliminary account of how this new approach will be compared to the classic goals-based approach to evaluation. The learning history method was developed in the early 1990s by G. Roth and A. Kleiner. The technique was originally created as a means for generating organizational learning about change programs in work organizations. A learning history is defined in terms of its process and its reporting format. In the process, the evaluator solicits information from a number of participants about their experiences over the course of the change program. The findings are made available to members of the organization who meet for a collaborative review of the findings. This review generates ideas that promote organizational learning. The report follows a defined format to present the data in a way that is easily grasped. The approach was used in a Web-supported graduate course at Towson University, Maryland, to pilot test its use as a methods course evaluation. Results found the approach appears to be useful. A research study is being conducted to compare goal-based and learning history approaches in the evaluation of a faculty training program involving a dozen faculty members who planned to use Web support in courses over the following year. Cost effectiveness and the implications of an e-mail survey approach for data collection are to be evaluated as well. Preliminary findings are encouraging, although program goals were not explicit at the start of the program evaluation. (SLD)

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# A COMPARISON OF GOALS-BASED AND LEARNING HISTORY APPROACHES TO PROGRAM EVALUATION: A PRELIMINARY REPORT

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## PROGRAM EVALUATION: OVERVIEW

Evaluation is procedure that is invariably prescribed for any kind of educational programs, including college-level and faculty development courses. Even so, evaluation is seldom done in a formal, extensive manner for several reasons: formal, extensive evaluations can be time-consuming and, for busy faculty, often without reward. Further, formal evaluations can be saddled with methodological and procedural confusion.

One source of confusion arises from whether the focus of the proposed evaluation is formative or summative. Formative evaluations, in the ideal, provide information about how a program is operating as it is being carried out. Such information reported in a timely manner allows for adjustments and improvements in the program as it is being delivered. Summative evaluations, on the other, provide information about what effects, if any, were accomplished by the program after it has been completed. Each focal procedure has its distinctive information needs and operational schedule.

Another source of potential confusion derives from procedural uncertainty. That is, how should a formal evaluation actually be carried out? For example, practitioners have been provided four classic approaches to evaluation (Clardy, 1997):

### A. Experimental.

This approach applies the traditional experimental design to test the extent to which an educational program made a significant difference in some measured outcome, like learning, student interest, application, and so on. The “hypothesis” is that the program will make a significant difference in the dependent outcomes of interest.

### B. Effects-based (goal-free).

Here, the evaluator enters the evaluation as a blank slate, intentionally oblivious to any stated goals for or planned outcomes from a program. Instead, the evaluator will look for any and all effects (good, bad or unknown) that resulted from the program.

### C. Stakeholder driven.

In this approach, the evaluator first identifies the different groups who have with an interest in a program, like students, parents, administrators, other teachers, and so on. The evaluator learns what each group of “stakeholders” expects from the program, and then looks to see to what extent each of those expectations have been met.

### D. Goals-based.

This is the classic – and most obvious – approach to program evaluation. It is based on examining the extent to which the specific, stated goals or objectives of a program have been achieved. In a sense, this classic approach is a benchmark procedure against which to compare other types of evaluation and assessment procedures.

A précis of the goals-based approach to program evaluation is provided on the following page.

This report describes a relatively new approach to program evaluation – the so-called “learning history” approach, presents preliminary results of a pilot test of this method, and provides a preliminary account of how this new approach will be compared to the classic goals-based approach to evaluation.

## THE GOALS-BASED APPROACH TO EVALUATION

Type of evaluation	Summative
Focal question	To what extent were stated and explicit goals met?
Principal data collected	Indicators of achievement on stated and explicit goals
Requirements for doing this evaluation	Program goals and objectives must be identified
Procedure (assumes requirements are in place)	<ol style="list-style-type: none"> <li>1) Operationalize the goals and objectives into measurable indicators of performance.</li> <li>2) For each indicator, establish a standard to distinguish between success and failure.</li> <li>3) Collect information about performance on these indicators.</li> <li>4) Compare performance to standards: How well were program goals achieved?</li> </ol>
Timing of data collection	Generally conducted after a program has been completed
Advantages of this approach	Strong accounting for how well program worked in terms of program expectancies and desired outcomes
Disadvantages	Neglects other effects and conducted after the fact

# THE LEARNING HISTORY APPROACH

## Background

Early in the 1990's, this method was developed by Roth and Kleiner at MIT. It derives from the discipline of Organization Development and emerging interests in organizational learning. This technique was originally created as a means for generating organizational learning about change programs in work organizations. See the list of suggested readings included.

Note: in their own way, that's what formal evaluations should do: provide a means for learning about a change program (an educational course).

Questions:

1. can this technique be used as a method of program evaluation?
2. how does this method compare to the classic goal-based approach to evaluation?

## What is a Learning History?

A learning history is defined in terms of its process and its reporting format. As a process, the evaluator solicits information from a number of participants about their experiences over the course of the change program. The primary purpose of the process is to spur "reflective conversations" about the nature of the change process from a variety of viewpoints. In turn, this document is made widely available to members of the organization. Finally, members of the organization meet for a collaborative review of this document and its contents; this review generates ideas and conclusions that promotes organizational learning.

## Learning History Format

As a report, a learning history becomes a document like a scrapbook of memories and experiences of a change process. It is presented in a specific format:

- The major segments, stages or episodes of the process are identified, and they become the “chapters” of the report.
- Each chapter is headed with a provocative title.
- A brief narrative description of each segment, in terms of timing, participants, events and activities, conditions, etc., is included.
- A two-column format is used to present the data:
  - 1) Representative or significant quotes from the participants are included in the right column; participants are identified by job title only.
  - 2) The left column is used for interpretations, questions, themes or commentary

The document may also contain other information, too, like memos, announcements, or other documents.

A précis for the Learning History approach is also provided. An illustration of data-collection forms that could be used to create a learning history for this Lilly Conference is included as Appendix A.

## THE LEARNING HISTORY APPROACH TO EVALUATION

Type of evaluation	Summative and Formative
Focal question	What happened, whether planned or not? What can be learned from that experience?
Principal data collected	What participants observed and thought about their experiences in the program
Requirements for doing this evaluation	Access to a large number of participants and ability to obtain commentary from those participants
Procedure (assumes requirements are in place)	<ol style="list-style-type: none"> <li>1. Planning the boundaries and scope of the project</li> <li>2. "Reflective" or depth interviews with participants <ul style="list-style-type: none"> <li>• team of insider participants and outside researchers</li> <li>• diverse and large sample of people</li> <li>• other data can also be gathered</li> </ul> </li> <li>3. Common and recurring themes are sought</li> <li>4. Writing Draft 1 using the prescribed format</li> <li>5. Validation of data through participant review</li> <li>6. Group analysis of the document in workshops, where participants review the history to look for ideas for future practices based on what they learned from experience</li> </ol>
Timing of data collection	Best if data is collected while the change program is occurring (better contemporaneous reporting by participants)
Advantages	"Learning histories seem particularly effective at raising issues that people would like to talk about but have not had the courage to discuss openly"
Disadvantages	Labor and time intensive as proposed



# ADAPTING THE LEARNING HISTORY APPROACH TO COURSE EVALUATION

I adapted this approach for use in a web-supported graduate course I taught at Towson University in order to pilot test this approach as a method course evaluation. About this same time, I was beginning a study that would compare this approach to a goals-based evaluation method of a faculty development program.

## Pilot Test: A Learning History of the Change in the Workplace Course

In the Fall Semester, 2000, I used a Learning History approach as part of a required graduate course I taught in the Towson University Human Resources Development program. The course is called Change in the Workplace. One primary instructional goal for this course was to teach methods for producing organizational change. In that context, one topic that was taught was that of the “learning organization.” The Learning History approach was used as an instructional demonstration of this topic.

This course was taught with web-support. This meant that even though classes were held once weekly during the semester and students were expected to attend all classes, they were also expected to make extensive use of the web-based instructional system designed for the course (Blackboard 5). In particular, this meant that students were required to make regular comments on what they were learning and their reactions to the instructional experience.

One main point of adaptation of the learning history method in this case was that in-person in-depth interviews were replaced by the on-line messages and reports provided directly by students. Thus, data from all student participants was collected on-line and was provided directly by the students under a loosely structured schedule. Each class was its own chapter.

In writing the learning history, I made contemporaneous entries to the history after each class. Every few weeks, the updated copy of the learning history of the course was posted to the course web site where all students in the class could read it. Samples of this initial history follow.

## CLASS 1. BREAKING THE ICE, SETTING THE TABLE

Dr. Clardy began the first class promptly at 7 p.m. After reading the names on the registration list, he spent about 30 minutes going over the contents of his web page and the syllabus for the course. This was followed by introductions of himself and then each class member. After the break, the class worked in small groups looking at the case of Redwood National Bank. The class adjourned about 9:15 without completing the final section of the case study. Dr. Clardy posed a question to help frame the purpose and direction of the course: how can you efficiently and effectively implement changes like those seen in the case study?

<p>Are these the best goals for opening a class? How well are these goals met by the procedures used?</p> <p>This can be an example of the difference between espoused theories and theories in use. How well was the articulated intention really carried out? Was there another agenda which really guided what happened and of which the instructor might not have been aware?</p> <p>Learning goals seem to be of several types:</p> <ul style="list-style-type: none"><li>• Complete the course (with an A) in order to graduate</li><li>• Learn about how to manage organizational change</li></ul>	<p><b>Instructor:</b> I always try to set a tone and climate for the course at the start in several ways: by being clear about expectations, by involving students personally (through introductions), and by engaging them in a fundamental problem which the course will be examining. The group project is intended as much to set a norm of discussion and participation as it is to process content. I was very mindful of trying to work in the CourseInfo resource material, particularly during the syllabus overview. The case study still needs to be refined: it takes too long to get through it, and we did not even get to the third part. Turns out students seemed to be interested in how LW and I reacted to the defensive denials of the executive team in the debriefing meeting we conducted at "Redwood."</p> <p><b>Student 1:</b> My learning goals and objectives are two-fold: first, to do the best work that I am capable of while completing the course assignments (since this course is required as part of my degree) and second, to learn how to effectively incorporate change into any organization, since change is inevitable.</p> <p><b>Student 2:</b> My learning goal is to gain some REAL tools that can be used in facilitating organizational change. Theory can be useful, but I am looking for tools to use. I would like to develop work that I can use as part of my portfolio.</p> <p><b>Student 5:</b> I am still deciding what my learning goals are for this course, partly because I am still figuring out what the course is about. The syllabus and information on CourseInfo have given me some clues that the course involves more introspection than I suspected.</p>
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<ul style="list-style-type: none"> <li>• Not sure what their goals are</li> </ul>	<b>Student 12:</b> There are several things I would like to get out of this course. I would like to become proficient at the Blackboard, earn an "A", and learn to implement procedures of change in the workplace from the practice end of the continuum rather than the theory end.
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**Class 8. PARADOX: HOW CAN WE ALL KNOW SOMETHING THAT NO ONE OF US KNOWS? OR, WHAT'S THE SOUND OF ONE HAND CLAPPING?**

Dr. Clardy reminded the class to complete the peer assessment within the next week or so. The first 40 minutes of this class were spent reviewing two key concepts left over from last week: employee attitudes about change and the contingent approach to change management. The remainder of the class was spent doing the Organizational Learning simulation of Letz Parti. There was a rapid debriefing on the points. Finally, the first graded exam papers were returned.

<p>Change in classroom management in response to survey feedback</p> <p>Learning about organizational learning</p> <p>Ideas for next time:</p> <p>There were favorable student comments about the production phase</p> <p>Provide an advance written explanation of what the simulation is</p> <p>Provide element on organizational learning disabilities</p> <p>Deal with linkages to the course's knowledge management system</p>	<p><b>Instructor:</b> I was mindful of starting on time (even though only about 2/3's of the class was present) and did not feel badly about keeping the class until almost 9:30. This was in response to a survey feedback comment.</p> <p>I'm ambivalent about the Letz Parti simulation, and am wondering whether I should reconsider using it. Is it the best way to convey the idea of a Learning Organization?</p> <p>My observations:</p> <ul style="list-style-type: none"> <li>• the production simulation is good, I think;</li> <li>• where it may break down is in the use of environmental signals and learning both how the world is changing and how the organization needs to change itself; this may be more of an explanation problem than a structural problem with the simulation itself</li> <li>• I'd like to do more about the learning piece, both in terms of organizational learning disabilities and in organizational learning procedures</li> <li>• I didn't link the discussion of knowledge management with either the simulation or with the other activities we are doing in the course (through Course Info Discussion Board and this learning history) to create a knowledge management system of the course</li> </ul>
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## Class 10. CHAOS!

Tonight, we followed a **poster presentation format** to allow students to present their **professional practice papers** reporting on a **change model** they studied. We used three rounds of about 5 each round. There seemed to be reasonably good levels of participation. The following organizes this discussion around these three **issues**.

### 1) The Poster Session Format

Confusion by students over what a "poster session" is	<b>Instructor.</b> CHAOS was the way some people seemed to react to this, in spite of at least two separate sets of instructions about what will happen. Upon reflection, it is clear that most have not done anything like this. They came in, as a general rule, with poor to no visual aides.
Suggestions for organizing the classroom presentations: provide guidelines for how much time to spend at each station	<b>Student:</b> I thought this was an awfully good idea and generated good class participation. Many of the students seemed to enjoy presenting their findings on different subject areas to others. I liked the idea of having 4 or 5 stations where students could present - one suggestion for next time - set it up so those students listening need to take 5 minutes of so to stop at each station. What I observed was that some stations were very busy, while others were not. But overall, a very nice idea.

### 3) Selecting a Model of Change

Providing a list of approved references was not sufficient	<b>Instructor:</b> In spite of the book list, there were a few poor choices used. One was a few pages from a text used in another class, a second was a pseudo-philosophical treatise with little arguable relevance to the course, a third was a complete book used in another class. Further, many used books that simply describe an end-state without any model for how to get to that end state.
The quotation is edited somewhat [the changes made are in brackets]	<b>Student:</b> I have a concern that I have to "get off my chest" regarding the last project. I felt insulted in the presentation on [a leadership] book because I had the understanding that we (the grad students) had to pursue more "proven" or researched methods of change management--not a self-help book. I know that you have final discretion to approve whatever book you deem appropriate--but I felt that [that student's] selection was both degrading and diminishing to the level of studies that we have pursued in the course so far. To make matters worse, [this student who used this text] was bragging that he was reading
Other students pay attention to the quality of the work provided by their classmates	

	<p>the book for another class.... There were other students that researched and presented materials on a graduate level, presented arguments about why the author's theories would work or not. To me, THAT was the purpose of the learning exercise. I am proud of the work that most of the class has done. I take the opportunity of grad school as a serious commitment--to the instructors and to myself. When people "slide by" with such mediocre effort, I feel angry.</p>
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### Recommendations on the Professional Practice Review Paper Assignment

What seems to be indicated	<p>Changes to the syllabus:</p> <ul style="list-style-type: none"> <li>* You must use a visual aide and it should be a poster-sized or better</li> <li>* Do I require them to provide a handout if their paper will be downloadable? Maybe not.</li> <li>* Require that all students email me with their selection, by the 4<sup>th</sup> week of the semester. I have to approve it, and if I don't, then I may reject their paper.</li> <li>* Spell out more clearly in the syllabus and the lecture the difference between a volume that specifies some end state and one that provides guidance about how to get there.</li> </ul>
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### My Observations about the pilot test

A. In writing the history, I had to be conscious of wearing two hats:

1) That of a participant in the program with my own experiences as instructor and a member of the course/classroom system

2) That of the “outside” reporter and interpreter of the process

In general, I think I could effectively separate the two roles and perform the authoring duties of brief descriptions of what happened in each class, including a range of student and instructor comments, and adding themes and commentary.

B. I was now making visible for public inspection my internal dialogue about my experiences in leading the class. This included any doubts and frustrations I was having, and issues I would have kept to myself were now expressed in this document. This was a new experience for me, and I found that by writing about my experiences in teaching it was both a catharsis as well as an inflammation. Sharing my concerns was a relief in some ways. However, the act of putting these concerns in writing also tended to facilitate a concentration on certain issues, and I would begin to dwell on certain problems which were now “public”.

C. Few students read the report; only one student responded to me about it. By the time I could finish the full report for the course, it was the semester end and students not available to for group meeting

D. I used the report extensively in improving how I taught the course. Even though this was the fifth time I taught it, I identified more than 15 significant changes to make to the course based on a review of the final report.

E. The Learning History approach can be adapted and used as a method for educational program evaluation.

# COMPARING GOAL-BASED AND LEARNING HISTORY APPROACHES: A PRELIMINARY REPORT

## Background

Given that the learning history approach to program evaluation is feasible, how does it compare to the classic goals-based method of program evaluation? The relative cost and effectiveness of both approaches can be assessed. To do this, I am conducting a study comparing these two approaches in an evaluation of a faculty training program at mid-Atlantic university. The program was held over the summer, 2000 for a dozen faculty representing all the major colleges at this university. The program taught the participants how to use a web-based instructional system recently installed in the campus. In exchange for their paid participation in this program, faculty members agreed to design and use web-support in a course they would teach in the following year.

## Research Comparison Study: A Preliminary Report

This study covered here will focus on examining two questions:

1. What is the relative cost-effectiveness of the learning history approach compared to the goal-based method of program evaluation?
2. Instead of in-depth interviewing, what are the implications of using of an email-based, survey approach for data-collection?

The study is still on-going. To date, I have interviewed program principals to identify the background to and goals for the program. These interviews also yielded information for dividing the program into seven segments, providing a framework for collecting the data. Using this framework, a survey form was prepared and sent by email to all parties involved in the program, including faculty, program administrators, trainers and student aides. The survey form asked the seven questions for each segment; the basic format is shown on p. 15. Respondents typed in their answers and returned the survey on-line. A sample of the resulting learning history is included on pages 16-18.



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**Phase 1. Off to the Races: Planning for the <PROGRAM>**

Approximate dates of the episode: February 1, 2000 to March 30, 2000

Synopsis of what happened: After the Fall and January, 2000 experience with the Provost's initiative, the <PROJECT TEAM> began a series of discussions in February to plan for a <PROGRAM>. These discussions included the Provost. During this time, funding from <A CABLE COMPANY> was also obtained. Certain program parameters, learned from the fall initiative, were included in the design of this program, including: competitive bidding among faculty to participate, providing financial incentives to participate, scheduling the program over the summer when the faculty would have more free time, "upping" the courses targeted (from lower-level to upper level undergraduate and graduate course offerings), and reducing the amount of on-line presence (to about 25%) required from the program. This phase of the program culminated in a two-page Announcement that was released to the faculty in the early spring, 2000.

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Please recall your involvement in the episode identified above. Feel free to refer to any notes, manuals, calendars, or other memory aides that you might have. Please answer the following questions:

1. Did you have any specific thoughts or feelings about the <PROGRAM> or your involvement in it when this episode began? If YES, please describe.
2. What were the most significant or important thing(s) that happened during this episode, as you recall?
3. How would you describe your involvement or participation in this episode?
4. What problems did you experience or issues did you see in this period?
5. Please add any other comments or observations you have of this period and the activities that took place in it.
6. What was your assessment of the <PROGRAM> at the end of this period?
7. Do you have any recommendations or suggestions for how to correct or avoid problems, or to make the Institute more effective in the future?



### Episode 3. Let the Games Begin: Kick Off

Approximate dates of the episode: May 31 (plus and minus a few days)

Synopsis of what happened: On May 31, the first kick-off meeting of the participants selected for the program was held in a computer lab room in University Library. The two-hour meeting included a round of introductions, plus an overview of the program. Participants received a book about teaching on-line.

Beginning the process, faculty entered with various issues and concerns:	<b>Assistant Professor B:</b> I remember I was very nervous when I found out that almost everyone else was more advanced than me in terms of the courseinfo software.
Uncertainty about one's skills seemed to produce a reticence and reserve	<b>Instructor:</b> I tried to stay low-key, as I knew others had wider experience in the field. <From this meeting,> it was apparent from this get-together that planning and solid university administrative support were built into this summer program.
Questions about what participants were supposed to do in the Institute	<b>Assistant Professor C:</b> I didn't attend the meeting <but> after getting information from a coworker, I was concerned about all of the "requirements" of participation that was not disclosed up front during the application process.  I liked the book a lot.  <b>Assistant Professor D:</b> While I was interested in the content, I was anxious about who would be there, what I might be expected to do during that session, and so on. Some of that anxiety derived from a status change a participant in the program had experienced and my reactions to that. In short, I was stiff and unresponsive during this meeting; this attitude prevailed during the remainder of the Teaching Institute, for basically the same reasons. There was also some uncertainty about my computer skills.
Initial introductions were insufficient to prepare for best participation	I thought the most significant thing about this episode was what did NOT happen: for a group that would be working together over the summer, the introduction phase was short and did not use any ice-breaker type of activity. While I knew some more details about the others, there was no chance to get to know them informally or begin to establish any social ties.

	<p>My involvement or participation in this episode was attentive but perfunctory and restrained. I asked to be excused from the initial training session that covered the basics of using the on-line instructional system, which I felt I already knew. I had a feeling this request was reluctantly granted.</p>
<p>Incomplete information provided in advance?</p>	<p>We received the summer schedule for the program for what I thought was for the first time. I believe that it may have been distributed as part of the initial announcement. I remembering feeling surprised in seeing it for what I thought was the first time.</p> <p>I would recommend spending more time in building personal relationships between participants through ice-breaking and/or cocktail-type social gathering. Actually, I'd recommend doing both.</p>
<p>Questions about attendance arose from the start</p>	<p><b>Program Manager:</b> It was really important that everyone attend the kick-off session. Yet some were unable to attend and that set a tone for the remainder of the Teaching Institute. The Administrator was pretty upset about the attendance problems.</p>
<p>A goal of the Institute was to create learning and mutual support cohort</p>	<p>One of the goals of the Teaching Institute was to have faculty work in cohorts throughout the Teaching Institute to share ideas and learn from each other. There was such a wealth of teaching experience in the Teaching Institute group, we wanted to harness that experience to the benefit of the participants. We tried to group participants by teaching strategy beginning with the kick-off session, but it didn't work as well as I hoped. In retrospect, I think it was too early to decide what strategies participants wanted to use. In several cases, participants selected teaching strategies at the beginning of the Teaching Institute and after rethinking their courses for partial online delivery, they switched to using other teaching strategies. In future institutes I would form cohorts later.</p>
<p>But</p>	
<p>Early emphasis on teaching strategy was too soon</p>	<p>I hoped the book by Heidi Schweizer would be well received.</p> <p>Otherwise I think the kick-off session went well.</p>

Recognition issues among staff	<p><b>Support Staffer A:</b> As a member of the 'team'- I felt somewhat like an afterthought. &lt;The other staffers&gt; worked on the workshop planning nearly independently and clearly were the 'top of the bill' during the training sessions. I was just learning the on-line instructional system myself- so I had more in common with the faculty participants. But the constant focus on the other support staff got old after a while.</p> <p>As a kick-off- I though it was ok- I'm not sure how you all felt.</p> <p><b>Program Administrator:</b> I'm not sure everyone was on the same page at that first meeting. I thought there was an opportunity for everyone to get a better sense of what was going to take place in the summer. It was also a way for the faculty to get to know one another.</p>
Possible problem: unclear understanding of what the faculty were wanting to gain from the Institute	<p>Because we were ending the Provost's Web Course Initiative at the end of April and starting the Teaching Institute at the beginning of May, we did not have to the time to talk to each of the faculty in the Teaching Institute to have more information on what each of them expected to get out of the Teaching Institute. This would have been valuable information BEFORE the kick-off meeting to make that meeting more meaningful to the faculty as they started the Teaching Institute activities. I feel we were already a bit off target in giving the faculty what they wanted and needed.</p>
This condition created by the rapid deadlines faced	
Recommendation: meet with faculty personally prior to start to identify what they want to learn	<p>&lt;I would recommend&gt; at least one substantive 1on1 meeting with each faculty member after the person is accepted into the program and before the kick off meeting. Then a very directed meeting of the team to hear what the faculty members will be doing and what they wish to out of the Institute so that the kick off meeting draws the faculty into the process and helps them to hit the ground running.</p>

#### Non-responses to questions

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### Preliminary findings and implications

1. Program goals were not clearly identified at the start of the program. For various reasons, including last-minute funding and the need for rapid delivery plus changing university priorities, the goals for this program were not explicit at the start of the program. Rather, goals were implicit and informal at the start of the program and only became explicit and specific through discussions after the program had already been completed.
2. Some of the identified goals were conflicting, depending on the stakeholder group consulted
3. E-mail responses to the questions were often short but did reveal thought and consideration.
4. There was a 50% response rate from faculty; 100% from the five administrative principals and trainers involved.
5. It took approximately 7 hours to put together and edit the email entries into a learning history document that included direct quotes from all participants. This data was all collected in a month's period of time.

If in-person depth interviews were used and assuming an hour an interview, it would have taken 12 hours just to collect the raw data. That information would then have to be screened and transcribed (assume another hour). In short, it probably would have taken two hours per interviewee for a total of 24 hours. Further, there would be time required to schedule interviews. Plus the inevitable delays and cancellations would likely mean that it would have taken longer to get the data. It is unknown how much more information would have been revealed from the depth interviews, but it presumably would have been more.

The next steps for the research are to complete the goals-based assessment. The learning history should be distributed for comment. Finally, using a sample of administrators and participants, the two evaluation reports would be compared in terms of value, time, interest.

The result of this comparative study will be reported in a study intended for publication.

Appendix A. Illustration of data-collection forms that could be used to create a learning history for the Lilly Conference.

I. Segments of the Program. Based on a brainstorming activity among participants in this presentation, several major stages to the Conference can be identified, along with a provocative heading and a brief statement of the major events that happened during that segment.

STAGES, EPISODES	HEADING	MAJOR DESCRIPTORS

II. Preparing a concise chapter report. This template shows how the information could be applied to a Learning History format.

Stage \_\_\_\_: \_\_\_\_\_

Description \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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## LIST OF REFERENCES

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