EDUCATION STAFF TRAINING DEVELOPMENT PROGRAMME

EVALUATION IN TRAINING
TASKS - PROBLEMS - INSTRUMENTS
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EDUCATION STAFF TRAINING
DEVELOPMENT PROGRAMME

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TASKS - PROBLEMS - INSTRUMENTS

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Introduction

It is natural that someone who has undertaken anything with a particular effort wants to know the result. He wants to know whether he met objectives, whether what he did was well received, whether it has brought about the desired effects: he wants to know how good - how successful he was.

It is therefore surprising that thorough efforts of evaluation lag far behind this desire. Why? It seems that even and in particular, the simplest evaluation methods are not known; that furthermore, evaluators have not sufficiently clarified what they want to evaluate and for which purpose. So, method and intention drift far apart from each other. The result then is either an evaluation effort which has no impact on future approaches, or an evaluation with no substantial meaning. Worse, evaluation is oftentimes simply dismissed with the unjustified argument that eventually some learning could be attained through any training effort and that something useful be produced by any such intended activity. The argument overlooks the fact that the learning attained might have been haphazard or accidental, at the cost of scarce resources, time, energy and money which could have been used more effectively via an alternative training approach.

This brief guide tries to help clarify the purpose of evaluation and describes some approaches. It will deal with simple evaluation methods which are commonly and easily applicable especially by those who are inexperienced or constrained by resources, yet having a keen interest in the results.

So, intentions of evaluation and expectations of evaluators and their beneficiaries are described in their complexity and ambitions. Evaluation methods are then viewed in terms of appropriateness and applicability. Alternatives are suggested. There is no use in proposing a sophisticated method of evaluation, if the handling staff lacks knowledge of its processing. This may indicate that those for whom the guide is meant, are not coming from well established, professional institutions; it is specifically addressed to 'non-professionals', particularly in the field of training. In fact, many practitioners might find some thoughts and suggestions insufficient or wrong. This is good - it means that those 'op-
ponents' are experienced enough to dispute the topic, to understand the breadth and depth, and are therefore likely to develop their own approaches in evaluation, based on their own experience! What should count, is the meaningful result!

The paper itself is roughly divided into two sections, the first dealing with the rather complex approaches towards establishing evaluation criteria in the training process which at times appear justified by logic but theoretical in nature because of infeasibility. The second part deals with applicable methods and their value for various evaluation efforts, largely based on actual experiences in numerous training programmes of different nature and clientele.

If this paper can stir some thoughts, a major part of its purpose is already accomplished.

Some questions, some experiences are added. This is in part to explain, to exemplify what has been said; it is further meant as an opportunity for the reader to evaluate himself: he can illustrate to himself how much he has memorized, understood and learned similar to what he wishes others to do when teaching or evaluating.

One last thought should be added regarding the title: Calling this paper 'Evaluation in Training' should be a reminder at any one stage that evaluation is an integral, inseparable part of training and has, therefore, to be thought of and treated simultaneously with training.
PART I: RATIONALES FOR EVALUATION - OR AGAINST

What is common at school and known to every pupil in the form of tests, examinations and term papers, seems to be less often practiced - though more often talked about in adult education. The reasons are multifold, some of them psychological: Adults dislike to be put on a test feeling that it is a loss of face if they fail - and they might indeed if the testing is done with sincerity.

Another problem often rests with the teacher, instructor, trainer who has to make up his mind not only in terms of what and how he wants to teach but also in terms of what and for which purpose he wants the individual to learn. And if, then, he wants to control the learning, measure the learning, qualify the learning, he has to be quite familiar with the methods he may use and the quality he can expect. This is easier said than done.

It happens, therefore, that training and learning processes remain un-evaluated. It is hoped that the disciple picks up something in these processes which is useful for him, that he knows how to integrate new learnings into his already existing knowledge, how to place both in his experience and how to further develop this gain in knowledge.

Instructors many times excuse themselves for not testing accomplishments in learnings with the argument that adults, more so, if they have professional experience, should not be taught like children! They are mature enough to 'understand', to grasp what they are expected to learn and therefore need not be tested. This, in fact, is a very one-sided and weak argument which will never be raised by an experienced teacher. It overlooks two important factors:

(1) That teaching and learning are two separate processes which should - but evidently need not - be sequential.

(2) That the methods of teaching children may differ from those used in adult education, that however, the purposes remain the same: To create knowledge, understanding and skills.
The person to initiate, impart, stimulate those learnings in the broadest definition is the teacher. It is therefore he who requires special skills for teaching - a fact which is often and conveniently overlooked - as many teachers don't know how to teach.

However, skills of a teacher too can be measured and evaluated: One rather expressive reference basis is the amount and quality of learnings he is able to generate among his students.

Avoiding to measure the learnings also means avoiding to evaluate the quality of teaching!

Another deceptive statement is one which hints that adults should not be "taught" because they "know" already; they should only be "told", so they can "hear" and "see" and "observe". (This refers especially to 'seminars', nonformal and non-degree activities.)

Why, in the first place, would anybody attend any training or educational programme or course if he already 'knows'? And even if he has some knowledge, it is the task of the teacher to design and structure a subject such that it can be delivered for a particular purpose (training objective!) enlarging and deepening this knowledge. And this process must be evaluated:

- Whether it was delivered properly (teaching)
- Whether it was received in the intended manner (learning)
- Whether it served the intended purpose (applicable learnings and effect of applied learnings).

Manual skills are more easily taught - they can be demonstrated, they can be experimented on, the result is immediately visible. So the control, an evaluation of the learning, is easier. But gains in knowledge are more complex, they may not be obvious by themselves, but are rather manifested as a 'delayed effect' when applied to some process of thinking, deciding, acting.

Teaching 'management', teaching decision making, teaching 'curriculum development' can impart the techniques of how to do it, similar to how the
techniques of sewing a dress, typing on a typewriter and figuring the statics of a construction work are being taught. This learning can easily be measured. How well it is learned, whether the learner would know for which purpose he should apply his learning, in which situation and with which modification, is something that will show less easily and probably much later - which makes evaluation more difficult. We already touched upon two main factors which will determine the outcome of learning and evaluation:

(1) the appropriateness and quality of the teaching which embraces the amount and the structure of the subject matter (topics), as well as the method and quality of the teaching, the process of imparting knowledge and skill;

(2) the quantity and quality of the learning, dependent on the capability (level of understanding), capacity (level of intake capability and absorption in relation to time) and willingness (attitude towards learning) of the student.

It is obvious that these are ponderous factors which may determine and possibly mar the 'objective' situation for evaluation. Or should one rather say there is no undisturbed picture for evaluation, that there are too many variables? Yes, but this does not dissolve the necessity of evaluation; it rather indicates how important it is to clearly state what should be evaluated, for which purpose, through whom, and which assumption should be the reference basis for measuring the accomplishment.

Questions

1. What can be evaluated in training?
   - Give at least 3 examples which were mentioned in the text. -

2. Which are the main factors determining the outcome of learning?

PERFORMANCE AND THE CYCLE OF TRAINING

Trainers in adult education especially in non-formal education know abundantly the hassles they have to go through in meeting with the proper attitude towards training, to find confidence and support from employer, manager, administrator and - treasurer! The extremes - those of no recognition of training and those of overconfidence in training - are common and equally unfortunate because attitude and expectation are both inap-
propriate in doing justice to possible contributions of training in various fields of performance.

Training institutions or individual trainers are likewise exposed to searching questions of employers - justified in their own interest, though regarding the expected change in a situation - not person! - after the training. - That is, if the employer himself does not expect all his problems to be solved after a training of employees. -

The answer in the first case would depend on assumptions made by the trainer, confirmed by evaluation.

But which steps, the result of which the employer wants us trainers to predict, are included, which require an individual assessment and evaluation for the final statement?

For this we have to understand the process of teaching, learning and application of learnings for a particular purpose. This purpose is mostly performance and, thus, output oriented. (In this view we are excluding to a certain extent all those learnings which serve the purpose of self education without a distinct purpose of output orientation or professional performance). An employer, who is admitting his employee to training is performance oriented. He is interested in training only as far as he believes that training has an influence on performance. He will agree to training if it changes performance, provided a change in performance is needed. We may safely say that an employer does not know - and need not know! - which gains in knowledge and skills precisely have to be produced by training in an individual provided those are sufficient to produce the performance he expects.

What a trainer must therefore expect as an information input is an exact assessment of a given situation and the actual performance of an individual or a group of potential trainees.

The performance must be initially evaluated to identify deficiencies for which training has to make up. The reference basis for this evaluation is the desirable performance; how the performance 'should be' compared to 'how the performance presently is'. To the extent that actual performance deviates from desirable performance due to deficiencies in knowledge and
skills, the training-need is determined.

The trainer then translates the training needs into a training programme. This encompasses a number of successively and successfully undertaken steps:

- The proper selection of subjects matching a general objective
- The appropriate choice of learning objectives, met by appropriate teaching methods
- The identification of preliminary knowledge of participants matched by structure of the subject and choice of the learning objectives.

An evaluation of the appropriateness and quality of the training programme has to consider these criteria and its reference basis are the identified training needs.

The successful implementation of a training programme depends on 3 variables:

- The quality of the programme as described above;
- the quality of the teacher in the manner he is able to impart knowledge, to attain the learning objectives in his specific contribution as well as to integrate those into the overall objectives of the programme;  
- the quality and the attitude of the participants.

An evaluation of the training programme can be geared towards either of these three factors (reference basis are the desirable factors: "How should it have been" - or, towards the result of the training programme, the initially desired learning objectives.

If the trainee goes back to his work it is expected that

(a) he has gained learnings

(b) he can apply these learnings

(c) he will apply these learnings

The accomplishment of

(a) can be measured/evaluated at the end of the training-course

(b) can be evaluated with regard to the initially undertaken training-need-analysis
(c) can be evaluated in a comparison of previous and present performance, considering the particular learning objectives of the training.

If the learnings are applied it is expected that due to changed performance the initial situation changes, - changes due to knowledge gain by means of training! If the trainer is asked for the degree and the quality of this change - as we had hypothetically done at the beginning of this chapter, he is expected to make statements covering the result of all above steps which in this form and degree of certainty are simply impossible! What he only can do is, make predictions and indicate probabilities, based on experience and partial evaluation.

Before we proceed more deeply into the analysis of problems, we should clear the common enough confusion between measurement and evaluation. These two terms are often mentioned together and sometimes synonymously, which is incorrect. There is literature available trying to throw more light on the issue, yet giving different definitions and using different methods.

As our thoughts on 'evaluation' are meant for those who have to undertake either, it is desirable or necessary that we systematize, yet simplify the discussion. Therefore, we refrain from exposing definitions of various schools and theories. Our purpose is to establish the understanding that measurement and evaluation - though closely related - have different implications: the former be more quantitative in nature, the latter qualitative. Evaluation ought to be further understood as the more comprehensive process.

Measurement in this definition would stand for: How much did a person learn, how much has been changed - requiring a statistical data base. Evaluation goes beyond this. Evaluation has to assess the accomplishment within a given situation. Not only how much, but also - how well did a person learn. What is the impact of learning? On whom or on what is the impact? How and where does this impact show?

Answers to these questions need quantitative data - measurement - too, but further need to be analyzed and interpreted, the result to be given a "value", not necessarily quantified. Measurement appears to be compara-
tively simpler as it is more easily undertaken - provided one has a secure reference basis.

As a general rule it may be presumed that in any process involving learning, the memorizing can be measured; but understanding and aptness of application need evaluation to judge quantity and quality properly, which in turn allows for conclusions on the quality of preliminary learning.

Likewise teaching, understood as a process of delivering thoughts, ideas, concepts, findings etc., can be measured:

- How much information has been given, how many questions has it raised in the listener, the pupil?

Teaching is also being evaluated:

- How well has it been delivered (by the teacher)?
- What has been learned (by the pupil)?
- How well has it been learned?

Both measurement and evaluation are undertaken with two possible reference bases:

(1) The comparison of 'before' and 'after', which requires a quantitative and qualitative picture of the "is" situation prior to the activity, intended to bring about change, and after the same is applied.

(Typical case: Entrance examination to identify present level of knowledge; final examination to determine the gain in knowledge.)

(2) The comparison of a desired situation "should be" with an actual situation "is".

(Example: The required professional knowledge and skills of a curriculum developer should be ..... The actual knowledge and skill of a new recruitment to the job is ..... he needs training where he is deficient.

In this case a modification through timing is possible.

(a) The criteria for the desired situation "should be" are set normatively before the training is applied, and determine the basis of measurement; the deviation in the situation from the actual to the desired 'should-be-situation' is measured and evaluated after the training.

(Example: A person should be able to operate a computer after undergoing training = should be. What determines the training is the knowledge of what is needed to operate a computer properly. To which extent the trainee can do it after the training is the 'is-situation' for evaluation.)
(b) Criteria are set as a standard "should be"; the actual situation ("is") is compared - at whatever stage - with the desired, measuring and/or evaluating the deviation.

(Example: Managers should be proficient decision makers; 'proficient' in this case stands for a defined or accepted standard, supported by evidence of managerial success. The question then is: Does the individual meet or does it not meet the standard of proficiency as a manager in taking decisions?)

Next, we have to raise another important question:

THE PURPOSE OF EVALUATION

For which particular purposes would one want to evaluate? What does one want to know? Why does one want to know it? From whom does one want to know? What is one going to do with the gathered information? What does one not get to know? Where are the constraints to evaluation?

This only sounds like an exaggeration! A clear answer to the questions raised above or at least a precise description of the same will help considerably in establishing the necessary framework to make evaluation meaningful.

Yet, how many times do we find in questionnaires of training those general queries: "Did you like the course?" "Did you learn something?" and meet with happiness among those asking, if both questions receive the answer "yes". But how meaningful are those questions and, more so, how relevant the answers? Could we expect any other answer? Did we? What do we need this answer for? Which conclusions can we draw and which actions would we take if we were their recipients?

We shall go into the extensive discussion of question formulation later. Now only this much may be mentioned: "How was a course liked?" is a very general and very subjective question. 'Liking' is an extremely wide idiom; and "liking what? The course as a whole, the setting, the method, the teacher, the participants, the spirit in which it was held? - There can be so many factors overpowering impressions of details from the positive to the negative, that such a statement definitely needs some specification.
There are different purposes for which evaluation is needed and imagined! Therefore, different objects or people have to be considered:
Is the purpose of the evaluation geared towards performance (of people), effect of actions (of people, procedures, situations), appropriateness of techniques (in terms of "what?") or of planning (in terms of assumptions, strategies, attainable goals or attained goals)?

An evaluation of people is usually performance oriented, but distinguishes between people who deliver with a specific purpose and those who receive for a specific purpose.
The point of relevance in this distinction is that the process in the first group can directly be evaluated; not so in the second: the process of receiving is paired with its application, and is evaluated in:

(a) How the application is done,
(b) what effect the application causes.

Example:
A teacher teaches a student how to do extension work. One can evaluate the performance of the teacher: How he teaches, how he delivers. And one can also evaluate the performance of the student: What he learns, how he learns. The performance of the student is purpose-oriented, i.e. he is expected to apply his learning. The evaluation is geared towards his capability to do extension work (a), and to the effect it has on another person or environment (b).

The teaching of the teacher is purpose-oriented, too: Namely to deliver what he has been trained in, further to apply what he has learned: His skill as teacher (which fits into (a) and what he effects in the student to make him perform (b).
It is obvious that whatever falls under category (b) = effect, is more difficult to assess. The task is more complex and complicated as it contains more variables and factors deserving consideration. Yet, it appears to be the more frequent request. It is being asked for in all training which has to show its appropriateness and usefulness in the application. The training itself, however, tends to be of less interest to people - unduly, though - as it is only evaluated in terms of comprehensibility, feasibility and consistency in the process of teaching/learning. Either
in fact must be a primary concern of the teacher.

Questions (contd.)

3. What would interest an employer of a trainee more: The content of training or its result? And why?

4. What is the reference basis for evaluating the degree of appropriateness of actual performance of a professional?

5. The text makes mention of three variables on which the implementation of a training programme is dependent. Which are they?

6. In the previous text some major questions concerning the purpose of evaluation were raised. Which ones were they? Could you think of other purposes? Do they fall under these categories?

7. Measurement and evaluation are used in this text as two different idioms. Could you define both again in the meaning established here?

EVALUATION CRITERIA IN FIVE STAGES OF TRAINING

We, as evaluators, deal with the total process of training plus learning plus application, in which teacher and student are involved. Therein evaluation takes place at various stages for different purposes with different instruments and different target groups as the total outcome. And it finally takes place for the whole line of all activities which is called summative evaluation. A first stage in this endeavor is one of description: An input of information on desirable ends, objectives, actual situation, constituent factors, available data.

The second stage is one of analysis: An assessment of what is needed and must be done - for whom, what for and when, where, why.

The third stage is one of translation: Transformation and design of different strategies with a specification on what to do, how and through whom.

The fourth stage is one of implementation: Which content meets which objective, the latter being two-fold: One part of the objective is related to the subject, i.e. the topic (of the training), another one is related to the purpose of the learning which is determined by the performance expected afterwards to the extent that training has an influence on the same, and will determine the teaching methodologies used. Both are dependent on time which will be needed or be made available.
(Looking at a subject we may say: It needs one year to train a person in a specific area; but, to implement a project a plan may grant 3 weeks of this as in-service training for the staff.) Though the accomplishment at this stage is seen in the learning which, including the potential for its application, does not yet include this performance itself! At most it can be judged how relevant is, what has been learned so far, for the situation in which it has to be applied. 

Application is the final stage five. The interest is two-fold again: How is, what was learned, applied by a person? How meaningful is it for a particular situation and how much does it influence or change the same?

Now, each of these described 5 stages has already built-in factors which will indicate the potential, the need and the strategy for evaluation. Those start right at the 'description' phase which must be the basis for any planning of any activity: The description refers to constituent factors in a situation, to people, to tasks and functions, to targets, standards, enabling instruments, managerial and organizational mechanisms etc. Any information on one, several or all these factors is a necessary input which will ultimately determine what may be an appropriate action (step 3 and 4).

The amount and quality of information will further determine the accuracy of any subsequently undertaken analysis of the information to define the appropriate measure. Here, the earliest evaluation criteria establish themselves.

1. Sources of Information

At the description stage we have to consider which possible information is of relevance altogether as an information input. We will need: Descriptive information from whom (= different people) on what (= situation).

The first mistake is frequently made right here: Wrong people are asked the wrong questions. This happens, because the interviewer does not clarify for himself what the degree of knowledge on a subject or a person's direct/indirect involvement in a situation is. Any judgement on people or a situation is usually made from a particular person's point of view or interest.
Inquiring about "performance of a person 'A'" will probably produce different answers: If one asks the immediate superior of 'A' who has an expectation in the performance any person in 'A' 's position should meet, the reply would relate to a standard which is the basis of reference and comparison. If the question is directed to a subordinate of 'A', this subordinate would judge 'A' 's performance on the grounds of some professional knowledge he has only limited understanding of, rather than on intrinsic assessment of this function and performance.

And if 'A' himself is to be asked? He may be in a position to express his views on his superior and subordinate (as well as an organization, a situation etc.) better, because he is comparing his own expectation ("should be") and the evidence ("is"); his self-assessment, however, will tend to ignore his failures, omissions, the deviation in his performance from other peoples' expectation. The quality of his actual performance need not necessarily be the quality expected from him.

It is therefore wrong to assume that inquiring from only one person or one group of persons would yield the necessary data that constitute comprehensive information. If actions then are taken on their sole and incomplete responses, they might be inappropriate because the basic data were wrongly chosen.

Suggested test (8):

(8.1) Ask in one professional group for criteria why the person thinks his superior/subordinate is "good"/"bad", is performing "well"/"badly".

(8.2) Ask the same people how much of the above judgement would be mentioned or at least admitted by those people judged upon if being interviewed themselves.

(8.3) Ask the individuals why they think they are "good"/"bad" in their own position/performance.

In this last question people will at best mention things they do not know/do, but will be unable to qualify how well, effective, up to expectation ... they perform those things which they supposedly know/do.

This test also produces evidence of a typically wrong approach: To rely solely upon inquiring the potential trainees in identifying training needs.
**Suggested action:**

We prepare for a sound data base of information and description with the following questions:

1. From whom can one get relevant information?
2a. Who will be interviewed?
2. What is this person's relationship towards another person/function/process of our interest and concern?
3. What is the respective person's own degree of knowledge/involvement in the process of our interest?
4. What is - based on questions 2 and 3 - the quality of the information/judgement (s.a. general, superficial, policy making or general management oriented, distant or intimate, comparative or case oriented, biased or neutral)?
5. Which questions should then be asked with regard to our own interest (refer to 1, 1a)?
6. Why should particular persons be asked these (see (5)) questions (refer to 2-3)?
7. Which quality of an answer would one expect in the respective cases (refer to 2, 3, 4)?

Answers to this scheme will indicate

a) which of the possible information is available
b) what we can do on the basis of available information.

In evaluating again at a later stage we have to find out

a) whether, what we did, responded to what we could do
b) whether this had relevance to previously available information.

Thus, the new evaluation criteria are already established.

**Example:**

A government development-support programme is launched involving the services of front line agencies such as credit institutions, extension offices, a monitoring unit, etc. Programmes of this nature are usually accompanied by training activities. To be able to design different acti-
vities for different target clientele, possible information input would not only concern details of the programme, for whom it is, what its purpose, how to divide work and responsibility, but would also consider the beneficiaries, what they need in the form of assistance and advice, what they already know (so that it be given consideration), as well as the level of knowledge and experience of the different groups of handling agents.

Especially in programmes of large scale much of this detailed information is not available, the people are not accessible or representative.

So the solution tends to take the form of generalizations and assumptions of some justified kind, being made on the basis of available preliminary information. Any action taken, however, must consider that the probability of meeting real demands is reflected in the degree or previous generalization. Given the many cases, where generalization is inevitable or necessary, we have to concede that a considerable percentage of needs, expectations, requirements, are not or are only partly met.

If, however, a project is conducted on a small scale and the scope of training activities required is narrowed down to a specific focus, the factor of "inaccessibility" will be removed, more information becomes - and must be made - available, if the measure is supposed to meet specific conditions and requirements. These must be detectable through preliminary information in the description phase.

In applying the most common methods of statistics, samplings, sample sizes, variances, those would certainly reflect, what in the foregoing has been tried to work on so explicitly. So it may surprise some readers why to talk laboriously on an explanation when the solution is readily available at hand. - There are reasons. One is, as mentioned earlier, that this introduction into some questions of evaluation is meant primarily for 'non-professionals' who are yet involved in training and evaluation. (This is the case in much of adult training, in-house and in-service training as well as in the non-formal sector). These people often have very little, if at all, exposure to modern methods of statistics, especially in the social sciences, data processing etc. If they had, many a time they do not use them due to lack of access to instruments, personnel, lack of time and funds. Second: Much of this possible 'sophistication' is not appropriate in the classroom, in an ad hoc situation, in a 'one-man's affair'. - On the other hand, effectiveness and feasibility should be predictable and measurable especially in these situations. Therefore, the preconditions, the interrelationship of factors must be understood, be explicable. Then
strategies and methods can be devised. If this is understood, there is no limit - chances granted - to integrate them in any further reaching method or approach of sophistication.

For those in training we may take as a special reminder that in gathering information for training-need-identification

(1) the main source of information should usually not be the person to be trained but his employer, superior, subordinate or any person he is supposed to work with. Thus gained description/views are based on their respective assessment, expectation, judgement of effect;

(2) the strength in the description of a situation by an employer or superior lies in the description of the evidence "what is" not in the analytical reasoning "why" when it comes to training-related issues, and in the description of the effect of the "should-be-situation/performance", not in the indication "how" to attain it through training;

(3) a person with increasing supervisory/managerial functions has more strength in the description of standards and expectations than in describing individual performances of indirect subordinates;

(4) the strength in the information from a potential participant is mainly in the description of what he knows, but not in an assessment of its quality; and in an indication of what he feels he does not know, but not in its description;

(5) an employer/supervisor and a potential participant have in common an expectation in the training in that it should have a visible effect on performance and situation, but both parties do not know the techniques of training as to how to accomplish this. Therefore, one should not expect a suggestion from them, which training measure be applied, they only contribute in helping to identify the training objectives.

Questions (contd:)

9. Which are called the five stages in training to which evaluation criteria were ascribed here?

10. Compile some of the most relevant questions as you see them for gathering information in a TNA.

11. Evaluating the accuracy of information, what should be considered with regard to a potential trainee?
2. Approaches in Training Need Analysis (TNA)

In the stage of analyzation the information is interpreted:
- What is the implication of the evidence on people or a situation?
- If there is a deviation from a standard or an expectation - where does it become visible?
- Where does the evidence show?

Example:
- A teacher does not know how to design tests (evidence). He therefore has insufficient means to assess and diagnose learnings of his students (effect) = situation.
  
- A person has not been trained in accountancy (evidence) and can therefore not meet specific job requirements which ask for the same (effect) = person.

The evaluation of a properly undertaken analysis needs
- clearly defined criteria of 'standard' or 'expectation',
- a data information base to which the conclusions of the analysis can be traced back.

A very popular example where an analysis related to training is undertaken, and often erroneously so, is in the training need analysis (TNA). We shall show this by means of 3 questions:

1. What defines the training need (TN)?
2. Who defines the training need?
3. Who has this training need?

The TN is preceded more generally a definition of need, comprising two variations
- a) is a need felt through the complete absence of something (s.a. knowledge, skill)
- b) is a need felt due to the insufficient presence of something (insufficient = relative to a potential demand).

Focused on training, this means: Complete absence of knowledge/skill which
is required, or: Insufficient knowledge/skill for the purpose it is re-
quired for. The implication for the analysis is as follows:

a) 'What is required' sets the standard and the measure of accomplishment;
the assumption is, that no preliminary knowledge/skill, immediately re-
lated to the objective, exists.

The task is to analyze first what is needed to attain this objective,
starting from a "no knowledge level"; the degree of attainment rela-
tive to the objective is evaluated.

b) 'What is required' sets the standard for the attainment of objectives.
The analysis has to identify what and how much of preliminary knowledge
is already available, which will determine the starting level, which in contrast to a) - is above 'no knowledge'.

The common conflict, and consequently wrong procedure, is as follows:
The starting point for a TNA is usually the evidence of an actual perfor-
mance ("is") which deviates from standard or expectation ("should be").

However, the deviation of performance 'is' - 'should be' often occurs among
people of the same position. A proper information for the analysis must
reveal
- what is the expectation in the output (standard) 'should be'
- who deviates from it
- how does this deviation show
- what is the reason for the deviation
  - a) lack of training
  - b) lack of knowledge
  - c) lack of experience
  - d) inappropriate assignment
  - e) unclear function
  - f) interfering factors, like reliance/dependence on others, support services etc.

This brief enumeration shows, that by far not all criteria found in a per-
son, who shows a deficiency in performance, can automatically be associa-
ted with a training need for that same person. Now, supposed the factors
knowledge and experience can be singled out as the primarily causing fac-
tors, it must yet be assumed that the person was placed into the position
due to some preliminary training which has provided some, but not suf-
ficient knowledge: The 'need' then is to top this particular knowledge up.
This need might however, differ from another individual in the same position. The analysis then has to bring out what the person should know and, in fact, does not know, to enable him to do what he should do. This determines one kind of TN based on individual knowledge, level and performance. It applies especially in situations where people with different training or educational/professional background hold the same position and have supposedly the same knowledge-requirements, but not the same knowledge-background.

The other case is, where people are prepared for a position regardless of previous training, knowledge, position. The TNA then is merely guided by the knowledge/skill-requirements of this new position, and training provided to these clients encounters that some might know something of the subject presented while others do not. Consequently, the latter have to learn more and if they fail to do so, they still have a training need in these areas though being given a job related training.

Naturally, it is easier to undertake the latter analysis and set the learning-objectives normatively. (What should a person learn to be able to perform ...?) This is why TNA is usually guided by those criteria. However, in cases of acute problems, when training is called for, the TNA has to be guided by the knowledge and performance of the individual relative to the expected standard. The learning objective is combined with a training objective (What must a person be taught - to enable him to learn - to be able to perform ...?).

The wrong approach in the TNA for a particular purpose will only show in the evaluation of the performance: When people with different training needs (due to different knowledge) in the same position have been exposed to training which presumed equal training needs (guided by the requirements of the position only), and have, therefore, not been able to cover up their individual knowledge-gaps for the expected/needed performance. (This case is reversible for people in different positions with the same functions!)

As we were earlier, posing questions (a-f) to establish the TNA - the evaluation of its accuracy has to produce answers to those questions which would indicate, why a deficiency in ... leads to deviation; how this defi-
ciency is exactly described/qualified/quantified; what the resulting TN is. Again, the proper formulation of what we want, why, for whom, through what, provides the reference basis for the evaluation in preparing for the qualifying answers.

In summarizing it should be noted that:

The quality of the analysis
* determines the quality of the situational- and problem assessment
* determines the quality of identification
  ° in which various areas
  ° to which degree
  an intended action (training) can help.

Questioning people, seeking information, thereby leads to
  ° roots of problems
  ° problem-cause relationship
indicates different training-needs to serve one purpose or
  one training need to serve different purposes (subjects)
indicates: potential target groups.

3. Skills to translate Needs into Measures

An important phase which, in the case of training, is often given too little recognition, is that of translating needs into appropriate measures, otherwise called "project planning".

It is, sometimes, amazing to observe how professional institutions, staffed with non-professionals, go about this process which demands a sound knowledge of the potentials of training, its methods, structure, time and man-
power requirements - to name the few most important ones. This is a professional skill, as is accepted in other professions undisputedly: a mechanic who should not only recognize bolts and screws but should know how to fit them together functionally; a surgeon who should not only know the human body and its organs but should know how to successfully = skilfully operate on them is taken for granted. Why then is skill missing in so many teachers and trainers? As was pointed out earlier, the common sources of information may be able to indicate what is expected, wanted, needed as an output. But they can not be expected to suggest the method "how" or even the specific subject "what" rather than the subject area for a specific purpose. And if, in some cases, they can, the trainer has yet to advise in the possible techniques, the time that is required for it, the requirements regarding the person (preliminary knowledge, experience etc.) being exposed to it.

3.1. Means and Purposes in Learning

There always exists a danger in the wrong belief that talking about a subject professionally is already identical with the process of imparting knowledge. If an evaluation reveals that this is not so, this only proves the wrong premise. There need not be anything wrong with the speaker and nothing with the audience, it is the wrong combination of the two for an otherwise intended purpose. (To enforce this example, note that the qualifying terms 'teacher' and 'students' were omitted!)

If one invites a lecturer - what do we want him to do
- to state facts
- to explain facts and processes
- to talk about own experience
- to talk about special situations/problems?

And what do we expect from the audience
- to just listen and treat the heard as information
- to learn the facts
- to understand the facts/processes
- to apply the learned to their own work/situation
to compare their own experience with that of the speaker to find themselves confirmed?

Coming to think of the full meaning of these different - but realistic - possibilities, it becomes quite clear that 'talking about a subject' even if it is done professionally, does not serve these various purposes. Meeting them, demands different methods. And this finding determines the whole set of questions and answers for the strategy of translating training needs into training concepts, as well as the questions for its evaluation:

Initially:
- How do you interpret (see analysis) the information gathered (answers to your questions) in terms of training-related needs? - (Situation-Problem-Analysis)

Then:
- How do you define on the basis of the TNA
  - the general objective for the training,
  - the specific objectives in the training?

- How do you define the learning objectives in the training?

If we look again at the questions raised in connection with the purpose of learning (previous page), it becomes clear how important it is to distinguish between objectives related to a subject-matter or an intended performance, and objectives related to immediately controllable learnings.

Examples:
"Increase of performance and dedication of employees" (general objective).

Knowing, that performance and dedication of employees are dependent on a variety of different factors, we have to single out those which can be considered for training. We may, next, decide on a selection of specific, subject- and performance-oriented objectives:

"Instruct in supervisory functions, improve guidance and decision-making capability." (= 3 specific objectives, possible for one training.)
Lastly, we define the respective learning objective (= What is the purpose in choosing the subject?).

The participant
a) should learn: What are supervisory functions;
b) should learn/understand: How to guide whom, on what and why (student must do it himself);
c) should learn/demonstrate: The techniques in decision making.

These objectives will require the appropriate methodologies and, of course, the appropriate choice of subjects.

The evaluation - of the course content (lesson plan, project-plan) and the actual implementation, then, is quite simple regarding the criteria of matching subjects, purposes and methods.

It is advisable to ask oneself at this stage, which of the expectations set into training by immediate or final beneficiaries can actually be met!

3.2. Evaluation Criteria in the Sequential Process of Description - Analysis - Translation; suggested action

We can now summarize the process of the first three stages in which evaluation is needed: Initially we have to determine

(1) What do we need, to attain a certain situation?
(2) What do we want to attain be means of training? (purpose)
(3) What do we want to attain in a particular training course? (objective)

We are interested in:

a) What we are capable of producing on the basis of
   - information
   - manpower availability/capability
   - technical feasibility.

b) What we are actually producing in terms of
   - quality of training (generated learnings)
- results (performance)
- impact (situational change/project assessment).

In doing so, we have to assess what we know, which needs the description of the present situation or a perception of it in terms of: Constituting factors, people, tasks, targets, enabling instruments etc.

From these we undertake the assessment of what we need through an analysis of 'is - should be' situation, problems contained therein; people involved, including their knowledge and their function.

To identify what we produce we require
- measurement of deficiencies and learnings
and
- an evaluation of
  - the appropriateness of the need assessment
  - the appropriateness of the translation process
  - the matching of course concepts, participants and needs
  - the performance of participants and teachers
  - the effects of training on participants and situation

Now we draw - for better understanding - some crosslines to justify our steps:

Question 1: "Why would we analyze a situation/a problem?"
Answer: a) To gather information to identify training needs
  b) To translate training needs into various specific training measures

Question 2: "What are we supposed to do?"
Answer: We gather/identify/translate information/needs/measures.

Question 3: "What is the purpose for doing so?"
Answer: Information (amount and quality) given by different people
  a) helps to identify and describe training needs;
  b) helps in identifying/determining training objective and specific learning objective
  c) enables us to determine the target group which should attend a particular type of training (depends on proposed
learning objectives which influence content and objective relative to chosen subject).

This is a logical flow and if maintained as such, no wrong combination should occur, as is shown in our verification for so far undertaken steps:

- If the decision on ... training and learning objectives results in the ... design of course content and objective designed for ... a particular target group and
- If this were ... the translation of training needs into training concepts and
- If ... its appropriateness were dependent on the amount and quality of information, we are able to gather ...

regarding a given situation and a felt problem involving - people (with knowledge, skill, function)
- standards (knowledge, skill, performance)
- evidence and expectation "is" - "should be"

then this justifies the previously explained steps.

Why do we dwell so much on the process and even its preparation of setting up an activity, rather than deal with the evaluation itself? Simply, because in many instances the evaluators do not know what to evaluate, when to evaluate, and which data are available. As indicated earlier, the process of setting up a programme/project in preparing and planning it, has already built-in criteria for measurement and evaluation ...

If I know what I want, I have a basis for judging later whether or not I attained it. If I ascribe certain factors to certain evidence and let myself be guided accordingly, only to find out that I fail, something in my previous assessment might have been wrong. It might even occur that I am not clear about the appropriateness of ascribing (for example) an activity to a declared purpose. Then I cannot expect a clear answer from the evaluation: It may reveal how much was attained, but not: How much better it could have been attained unless I have previously ascertained that I believe my means to be the best for the purpose.
Further it should not be forgotten that evaluation in training is largely undertaken by those who run the training itself; or at least are involved. So, they should know which expectation they can have on the basis of what they are doing, making up their final basis and measurement of evaluation.

Questions (contd.)

12. The decision on training and learning objectives results in what? and is based on what?

13. What, then, can be evaluated according to the answers in (12)?

14. Why do identified training needs require translation into specific training measures?

15. What would one evaluate: A training need analysis (TNA) or a training measure? Why and with which purpose?

3.3. Training Course Development

It probably deserves an explanation why the development of a training course is discussed in the context of finding evaluation criteria at all, and if so, why at this point.

First, the training course development is, in logical sequence, the next concrete step after those three preliminary ones. It is still part of step 3: translation of needs into concepts, with the only and important distinction that the general rules have to be applied to the one intended, specific case. Therein success or failure will finally show. It is very much a skilful translation as it requires a combination of subject-knowledge and understanding of requirements as well as the capability to link both through effective and feasible techniques.

It is presumed that the details of going about a course development are known. Therefore, only the stages are described and the questions that will be raised at each. Because, as before, the answer to these questions establish the criteria for evaluation.
One aspect in developing a training course has to deal with the potential participant, another with the training need. This depends on the direction of initiative for the training: Meeting **individual knowledge gaps** with regard to a position/function/subject or meeting **general knowledge requirements** of certain people in a position/function/subject area (we had discussed the difference earlier), the respective step may be given prior recognition. In the final course development they must, however, be comprehensively matched.

With respect to the potential participant - aside from who he is, what he is and what his background may be - his **function** is of particular relevance as this will determine what he is expected to know and do and will serve as a guideline for what has to be taught.

I. We ask:

1. What are his responsibilities - not his responsibilities?
2. What is he supposed to do - not supposed to do?
3. What is he supposed to know - not supposed to know?
4. What is he doing - not doing?
5. What does he know - not know?

It may surprise that we are looking for an answer to the negation - what is a person not supposed to do/know. Remember, we are aiming at specific learning objectives as a part of the overall objectives. Remembering further that we may have people working on the same subject but with different functions, their requirements in subject knowledge might be the same, the purpose (our learning objective!) differ. That is, the **quantity** of knowledge is the same, not so the **quality**.

**Examples:**
There are differences, whether people **advise or supervise; propose or decide; know about something or do it**. (Compare with the above questions.) There are also differences in **quantity and quality of knowledge** for teachers in any subject which they are supposed to teach in primary or tertiary education. And the degree of knowledge on, say, cooperative law differs for a legal adviser and a cooperative manager.
II. We, then, ask regarding the identified TN:

6. In which particular subject matter must the person be taught?
7. What must he be taught? (consider 1/2-5)
8. For which purpose must he be taught? (1/1)
9. What particular learning is attempted?
10. Which method is appropriate for which learning?

Whereas the questions 6 - 8 refer to the results of the analysis in 1 - 5, the questions 9 - 10 require the knowledge of appropriate structures and techniques in training.

Accordingly, in step 3 the following is established:

III. a) General objective (II/8)
   b) Specific objective (II/9) (learning objective)
   c) Content (II/6 - 10):
      - subject
      - subject structure
      - timing
      - methodology

The evaluation of this process is twofold:
One does still take place in the phase of "translation" within which we describe this whole chapter of course development.

It is in the verification whether:
- The proposed course concept actually responds appropriately on paper, i.e. in the plan, to the questions raised in 1 - 10
- III a/b can be attained through III c; respectively, whether III c reflects III a/b

Another part of evaluation of this same process would take place at the end of the actual implementation or what we called stage 4. Then it will no longer be of relevance only what the initial plan/design was which could attain set objectives; then it will be evaluated whether it did attain set objectives.

The translation process before any implementation, therefore, concentrates mainly on objectives and methods set for the training (which implicitly define the admission criteria for the participant).
The following questions are the guideline for verifying the correctness or evaluating the appropriateness of a training-concept:

Is the General Objective justified by
a) the function of the trainee
b) the identified training needs

Is the Specific Objective appropriate in view of
a) its integration into the General Objective
b) the Topics selected

Is the Choice of Topics adequate for
a) the Specific Objective
b) the attempted Learning

Is the chosen Teaching Methodology
a) covering the subject of the Topic
b) attaining the desired Learning

Is the Learning in conformity with
a) the Specific Objective
b) the Knowledge/Skill/Functional Needs of the participant

Is the attainment of objectives in accordance with
a) the Situational/Problem Analysis
b) the Training Need Analysis

It will be noted that ever since in this elaboration a major emphasis is laid upon showing the logic in sequentially undertaken steps. Evaluation is not demonstrated in single instances, but always seen within the context of different processes which lead to the particular instance to which evaluation may be applied. On the other hand it may be argued by some that, considering all the environment, the preparatory steps and thoughts invested in the evaluated object prior to the act of evaluation itself are unnecessary, as evaluation oftentimes is interested in only momentary or single evidence. This is true only to the point that evalu-
ation may be undertaken on a sporadic basis or instantaneously. The proper process should however be the combination of what is called formative and summative evaluation.

However, evaluation is meant for those - at least two - explicit purposes: To verify assumptions and measures and/or to correct the same - either in a repetitive undertaking or for consecutive ones.

Therefore, one has to understand the whole process and has to know which considerations or combinations lead to the very point that is chosen for actual evaluation. Because, if it so happens that the evaluation reveals a result not anticipated before, one has to trace possible sources. The more detailed steps are known and explained, the easier it is later to narrow down the influential areas and factors.

Apparently this is often neglected. How else could it happen that we meet with so many mismatches?

Examples:
1) Faculty members, participating in a training course to learn how to design a curriculum on agribusiness are only given lectures as to what the various aspects of agribusiness are. The lectures in themselves are comprehensive and well presented but fail in teaching:
   a) What has to be considered in designing a curriculum on the subject agribusiness?
   b) How it is actually done (under consideration of important details)?

2) Managers should be trained in the techniques of a problem analysis. The course methodology foresees only lectures on the subject matter, including names of authors and different schools standing for the different methods and approaches.

   Result: The managers know the techniques theoretically, they do not know how to apply those, they were not given exercises to learn how to do it by themselves. And: As practitioners they need not know history and development of methods!

3) Senior accountants are given basic lectures in bookkeeping. (In fact, they should not have made it to 'senior' if they were truly not to know the basics!)
4) In a 2-day course on 'modern personnel management' for officers of a personnel department, one whole day is devoted to a description of the organizational structure and the responsibilities of the various sections in the institute. - (Do they really not know?)

The list could be lengthened. The examples stand to show different mistakes which are actually made and could well be avoided if each necessary step in the logical sequence of situational assessment-conclusion-strategy would have been met.

Questions (contd.)

16. In determining learning objectives why is it suggested to also inquire what a person is not supposed to know and do?

17. Which are described as the two major categories of purposes for evaluation?

18. Reasons for mismatches between TNA and the setting of learning objectives would be - what? At which stage of the evaluation would they show How could the evaluation trace the reason?

Example and repetitive exercise (19)

In the previous text indications were given as to how to go about an evaluation of a course design regarding its conclusiveness (p. 30). In the following we show excerpts from a real case, wherein a training course for cooperative development officers was to be redesigned or even newly designed if the situation would so demand.

There should be some further information: An initial curriculum was formulated in a national cooperative training institute in an Asian country. The institution's mandate is to train all the staff members employed by cooperatives in formal and non-formal training courses of several days up to several months. The (permanent) teachers are by approx. 85% former cooperative development officers on secondment to the school.

Rationale: The curriculum was developed because the cooperative movement in the country did not show the expected results particularly with regard to the integrated approach in management. One major reason was seen in inadequate training of the cooperative development officer (CDO) who is con-
sidered a key element in the attempted change. He is a government official, appointed by the government and reports to his ministry. He has to ensure that cooperative members can benefit fully from government policies in cooperative matters. His area consists of several cooperative societies. However, he is hierarchically under the cooperative manager.

Steps in the evaluation:
The question raised was whether a newly developed curriculum could prove adequate for the purpose of training the COO better to achieve more in the cooperative movement. This needed an evaluation which was undertaken in several steps. An initial one was to assess the potential/actual role of a COO within cooperative development through his work in cooperative societies.

(In the following example purposes and methodological steps are indicated, similar to what had been explained earlier.)

Premise (gathering information, describing the situation):
If a COO works up to expectation, an effect on cooperative development must be visible. Therefore, an evaluation of the work of several COOs (samples) in the societies was undertaken.

A categorization was necessary:
- What should the COOs have been doing? (Set standard for COO)
- What have they been doing? (For comparison/analysis "is" - "should be")
- What were the reasons for them not to do certain things expected: Lack of knowledge/skill or other interfering factors?

If it were lack of knowledge and skills those could be erased by training. Question to the previous curriculum: Which knowledge requirements are responded to in the past curriculum?
Premise: The past curriculum provided insufficient knowledge.

Question: What has to be changed in a new curriculum to meet the requirements in terms of general objectives, content, learning objectives? Are these requirements reflected in the teaching methods, the time-allotments for teaching, the capability of the teachers?
Some of the preliminary knowledge available helps in setting objectives, such as the fact that
- the course offered assembles people who have little or no practical experience as CDO since this is their initial training for the job;
- part of a CDO's function is to ensure implementation of government policies but that he is under the cooperative manager which has an impact on, for example, required ability in policy formulation and decision making;

(In formulating learning objectives we were asking earlier (p. 28) what is a person supposed to know/do - not supposed to know/do? - which can now be applied to the tasks and functions of a CDO.)
- the available teachers at the training centre have the practical job experience of a CDO themselves but no training as teachers;
- the initial beneficiaries of the work of a CDO do not know what he has been trained for rather what they expect from him.

The following exercise fell into two parts, one held in the classroom and one in the field:

1. A comparison of the past with the present curriculum on the basis of what the school teachers had or had not realized was needed.
   It appeared, for example, that from the curriculum outline the individual teacher could conclude little for which particular purpose a subject had to be taught. Due to their practical experience they felt that what a cooperative manager needs to know about financial planning or marketing has to be different from what a CDO needs to know. (Why? Because they have different functions: Decision making functions - advisory functions in some detailed aspects, monitoring etc.)

   But: a) Is the teaching of the same subject different for those different target groups?
   b) If so, how is this reflected in the curriculum?
   c) How must the teaching be done for the respective purpose? (learning objective?)

   It was then realized that, if one condition is not fulfilled, the other can not be met = evaluation of the effectiveness of the curriculum-design...
Another exercise was a comparison of functions of COO's relative to the
general training objectives outlined in the curriculum. Next, the compa-
rison of general and specific objectives came within the given scope and
sequence. The result was such that some specific objectives were not
fitting into the general objectives; further, that some modular contents
did not match the prescribed specific objectives - so, how could the cur-
riculum truly fit the needs of its target group?

Guiding questions for these exercises undertaken by several evaluators
were:

**Function Analysis:**
- Give a detailed description of the functions of the COO on the basis
  of your data gathering.
- What are they supposed to do - not supposed to do?

**Situation Analysis:**
- What is the common task of COOs?
- What are they doing - what are they not doing?

**Problem Description:**
- What is missing (in their action/in their performance)?

**Problem Analysis:**
- What of those is a matter for training? And why?

**Training Need Analysis:**
- Which are the areas suitable for training the COO?

For presentation of a new curriculum the following aspects were hypotheti-
cally suggested and their correctness tested in the field: Title, target
group and function; objective, specific objective, purpose of the training.
1. Part one:

**Title:** "Training Programme on appropriate Management System for Agricultural Cooperatives"

**Target Group:** Cooperative Development Officers

**Function:** The role of the Cooperative Development Officer in a Cooperative Society is to function as an organiser, supervisor, facilitator, advisor-guide and to assist in the development activities of the society.

**Objective:** Upon completion of the formal course of training, the participant will have acquired and developed knowledge, abilities and attitudes so that he will be able to:

a) Identify and define problems concerning farmers and search for information to resolve or manage these problems.

b) Work as a leading and guiding partner in the development activities of the society.

c) Educate the members and motivate them on the advantages of cooperative action.

d) Aid the development of an integrated approach.

In particular he should be able to

**Specific Objectives:**

(i) examine the socio-economic situation of the area

(ii) identify the magnitude of the problems faced by small farmers to be able to suggest counter actions.

(iii) identify:

(a) Reasons for variance

(b) Advise and guide on corrective measures in respect of weaknesses

(c) Targets and performance

(iv) prepare production, processing and marketing plans & financial planning

(v) contribute to the management efficiency and development

(vi) administer proper supervision

(vii) compare and contrast the difference between Mercantile vs. Integrated Cooperatives

(viii) guide and advise in maintaining proper coordination and communication

(ix) design training programmes on Integrated Management System.
2. Part two consisted of a field investigation. Samples were taken from CDOs as past (or potential) trainees to find out how they assess themselves (and how their needs are reflected in the curriculum). Further, their superiors were interviewed (cooperative managers) and their counterparts/subordinates (members of the cooperative) to find out how they would judge the effectiveness and performance of the CDO.

The questions were as follows:

To the CDO: 1. What are you doing (description)
   - on your initiative?
   - by request of the society?

2. Does the society respond to your suggestions?
   If not, why?

3. What are your major problems?

4. Where do these problems show (in which situation)?

Questions to Cooperative Society:

Who is respondent?

1. Is there any activity where you and the Cooperative Development Officer are directly/indirectly involved?

2. Which are those situations?

3. What is he doing?

4. What do you expect him to do?

5. Could you recall situations where you asked him for advice?

6a. What was the situation and what did you want him to do?

6. Does the CDO respond to your requests?

7. Have you worked with other CDOs?

8. Can you compare them in terms of -
   8a. their knowledge (specify)
   8b. their experience
   8c. their initiative
   8d. their involvement

9. Are you satisfied with the work of the CDO?

10. What would differ in your/your society's performance if you had no CDO?
Such, the assumed training requirements were verified and incorporated into the outlined curriculum. Some qualifying statements had to be made along the guideline which was then formulated. On the basis of this investigation and its results the evaluators decided to prescribe the following to the curriculum developer:

Curriculum Development

Title: "Basic Course for CDOs on Integrated Management for Cooperative Societies"

Overall General Objective:
Participant should acquire basic knowledge and skills to fulfill his function as CDO in assisting the various bodies of a Cooperative Society in:

1. Setting up an integrated management system
2. Listing of priority areas
3. According to the field survey
4.
5.

Specific Objectives:
Further:
- To assist Cooperative Societies in finding solutions to problems;
- To supervise certain activities and operations of the society (specify);
- To respond to the requirements of the Cooperative Department.

The final design of the curriculum then prescribes
- the various themes/areas with scope and sequence of topics
- the attempted learning objectives/learning experiences
- the teaching methods
- the linkage to other (related) topics
- the time frame for each subject
- the evaluation instruments (s.a. tests, questionnaires, surveys etc.)

All the details were now proven by a precise need analysis.
3.4. Learning Objectives and Teaching Methods

One of the major mistakes undertaken - and admittedly not least because of lacking skills of teachers - is in raising aspirations and expectations in learnings, which are by no means responded to by adequate teaching methods. The fact tends to be rejected that there are different kinds of learning and to attain those, requires different techniques or methodologies.

Next, it seems difficult for some to understand that there are different purposes in learning which may again have an impact on the methods of teaching.

Basically we may distinguish in the learning process.

1. the hearing of facts which may or may not be forgotten (probably the most uncomplicated way of learning)

2. the memorizing of facts which may result in mere repetition of the same

3. the understanding of facts which goes beyond memorizing them in that they can be placed in proper perspective, can be interpreted and can be related to causes

4. the applying, which is a combination of theoretical learning (as described in 1-3) and practical doing of the same person.

This listing of various types of 'learning' indicates what I would call a qualitative increase in the stages of learning. Now, based on this, one will be able to categorize people who require training in 3 groups:

- Those, who just harbour knowledge; they know.
- Those, who will apply, what skill and knowledge they have learned/gained.
- Those, who will impart to yet others, what skill and knowledge they have learned/gained.

These different learning-needs must be reflected in the course design

a) in the training objective
b) in the function of the trainee.

Are they - is the question in the evaluation?
Here follows a very simple mechanism as to how to approach the evaluation of successfully undertaken teaching with respect to the learning objective for a participant, concluded from the purpose of training of his function: We describe the function of the person and his responsibility and determine the implication these have on the knowledge he requires, the learnings he must gain. The implication is

- on the training subject (incl. topics)
- on the training process (structure)
- on the overall and learning objectives
- on the training methodologies

and must therefore be visible in the same; or: In looking at either, one must be able to draw the right conclusions as to the learning and purpose-oriented intention. This is an important evaluation criterion.

If it is not met, something in the translation process (needs-concept) went wrong. An example may illustrate this: Think of any position a person is holding. Describe his function. What is his responsibility in different areas (to which one would have to give consideration in the training)? Is it:

(Try these for the position of a manager, a clerk, a curriculum developer designing material, a teacher supposed to follow curriculum and teacher's guide, an accountant, a typist.)

- to decide
- to approve
- to appoint
- to supervise
- to control
- to carry out
- to propose
- to prepare
- to suggest
- to advise
- to assist

**Question 20:**

Try to determine the implication of the above listing; raise the question: "What/for which purpose does a person you have to train, learn - need this person not learn?" Is the strategy chosen to attain this, appropriate?
This is not the place to talk about teaching methods. In the context of identifying evaluation criteria an evaluator should yet know and consider accordingly which methodology
- is possible
- is feasible under given circumstances
- is most appropriate
to attain an attempted learning.

It may turn out that there are options, not all of the same quality or recommendable, because they are time-consuming (s.a. role game); costly (s.a. field trial); require particular skills on the teachers' part (s.a. case study), or previous exposure of the participants (s.a. simulation game).

Is the expected output predictable and stands in relation to the input? Checking those points by means of: Yes/No/Why - questions establishes useful references, provided the evaluator knows the options!

To evaluate teacher performance and possible learning from a suggested topic the most effective method is probably one used in teacher training: The demonstration through prospective practitioners. Each has to select a small topic proportionate in timing and weight to a wider topic so that it can be taught in a given time (s.a. one unit in a module, a curriculum etc.).

The trainee will have to define: The objective of this unit (relative to a discovered problem or purpose), he has to state the structure of his presentation, the method he will use and the measure with which he will control/evaluate the learning he has attained.

Participants (and critiques in the discussion) can be his fellow-trainees or prospective i.e. 'real trainees' (s.a. pupils). The former case has the advantage that his fellows are better judges of the didactics applied and better partners in the discussion of alternatives, the latter reflects reality/level of knowledge and correctness of previous assessments/TNA.
This is a healthy exercise because it shows immediately how much of the intended can be realistically taught and learned under favourable conditions. It will demonstrate that many objectives in training are too ambitious and complex. If targets in one pointed, well prepared lesson cannot be attained, how can this be in more comprehensive context? Such an exercise will further reveal that those performing will shy away from relating their evaluation directly to the set objective! They will test memory rather than ability to apply - because they are not sure whether they are able to impart those skills through their teaching!

In the foregoing much has been said about stages in the evaluation process, the overall purposes and the reference points or evaluation criteria. It is now necessary to deal with some evaluation instruments and techniques, their applicability and their appropriateness. This will be done in chapter two.
When talking about evaluation we think a lot about theory and logic. When undertaking evaluation the need for practical, feasible approaches and methods is evident, which should be simple, cheap and effective. Reality shows that much of the detailed information we have claimed inevitable for an indepth evaluation and a comprehensive result is not available, especially when reviewing whole processes. Evaluation of simple aspects surfaces more tangible results. This is often done by means of questionnaires, interviews and discussions. But this too, requires solid material. In the following we shall be dealing with some techniques of designing questionnaires, interviews, guidelines and frameworks for discussion of various purposes. We shall place a specific focus on reliability of answers to a range of modifiable questions.

Initially we want to establish what really is of concern for evaluation in different activities.

WHAT IS EVALUATED IN SEMINARS

The components evaluated in a seminar fall into three categories:
- The preparation and organisation of the seminar.
- The conduct of the seminar.
- The results or learnings from the seminar.

The purpose is twofold and should carefully be distinguished:
- assessment of the activity as such
- conclusions to be drawn and recommendations of participants for consideration which help in future planning.

Under 'preparation and organisation' fall the following aspects:
- Have invitations been sent out in time?
- Have background information on the subject and the objectives been sufficient and clear?
- Has resource material been received in time?
- Have travelling, financial and administrative procedures been made sufficiently clear?
What is the relevance of those questions and what is it that the evaluator should know?

The question of issuing invitations can have different implications. If an invitation is extended to an individual he or she should be granted sufficient time to arrange a schedule. Too short notice might effect that the recipient is either committed otherwise and declines or sends somebody else. Depending on the nature of activity for which the invitation is meant, this may have a negative impact on the composition of the target group, such as different levels of responsibility, professional experience etc.

If invitations are extended to institutions one has to allow for time within this institution to identify the appropriate person who will in turn need time to get the necessary clearances (particularly if to travel abroad).

Background information on the subject and objectives of the activity are essential as they must ascertain that the participant can think about his expectations in the accomplishment of the programme and its possible usefulness. They are also necessary to ensure proper selection of an unidentified participant by any superior as to level of knowledge and experience which may benefit from the event.

Resource material sent out usually has a story of its own. If sent together with the invitation to an unidentified person it tends to be kept by the first recipient and never gets to the actual participant. It may be forgotten, not read or misplaced. It might never have reached the recipient if postal services are not very safe or fast. The lesson to be learnt from negative experiences is to devise other ways of providing course participants with material.

If the course conduct depends on the previous reading of materials it is important to verify whether this was received otherwise the picture of effective learning in the course is distorted. (The question of material might arise again in the context of course conduct.) In the present case the evaluator is merely interested in the technical or procedural aspect which may or may not need modification.

Travel, financial and administrative arrangements are often considered an unfortunate appendix by non-administrators who are in charge of running
professional courses. Yet this item demands care and gets utmost attention by participants. Much of their attitude and goodwill towards the activity depends on satisfying arrangements. Therefore, these need to be made very clear. Who provides transport, tickets, determines schedules (stopovers by plane), who pays what and what is not being paid/reimbursed. The same applies to boarding, lodging, per diem or pocket money, the currency that is paid, the modes of payment (cash, cheque, transfer). The evaluator is mainly interested in acceptability, feasibility and efficiency of procedures which should be as simple as possible from the administrative point of view, yet suitable to the participants. If complaints are made in the final evaluation regarding those arrangements this is usually reflected in the participants’ general attitude towards the programme.

The second component to be evaluated is one on the conduct of the seminar. This will be geared towards the subject matter, its presentation, the methodology, the material used, the time given for various topics and the total subject. It may include statements on the appropriateness of the locality, facilities and logistics.

As to the subject matter the evaluator has to be sure from which level of understanding the respondent is reacting. A person already knowledgeable in a subject will have a different view from a person who is newly introduced to it. It makes a difference whether a person has selected a subject out of professional interest, curiosity or because it was forced upon him. This background determines the willingness of a person to accept, learn, think about what he has been presented with. It also determines the validity of a statement in terms of ability to judge or compare. A person being exposed to a subject or a seminar for the first time is likely to accept or condemn it in total due to lack of comparable experience. Much care has to be taken by the evaluator to decide whether the feedback received is rooted in the programme or the prior experience of the participant.

When the subject of a course is evaluated we look into the coverage of topics and specific aspects to be dealt with as can be concluded from the formulation of the main theme:
Example:
1. 'The use of computers in administration' versus:
2. 'Special problems in the use of computers for administration' versus:
3. 'Latest developments in the use of computers in administration'.

One would expect in the first case a broad and basic presentation covering the various uses ... allowing for some basic technical remarks around computers.
The second would have to refrain from the same, must be able to assume knowledge on those and must clearly be problem-oriented.
The last one may presume a sound knowledge on theme 1, even insight into theme 2, can build on both and concentrate exclusively on latest developments, meaning: it can be justified in being highly specialized.

Within the prescribed frameworks the subjects and topics to be judged upon in the evaluation are:

Did the subject content match the level of understanding of participants? Was the general objective matched by the objectives of sub-units? Did topics follow in sequence? Were the methods used appropriate to acquire the desired learnings? Was enough time given for plenary, working groups, exercises, excursions? Were the instructions given clear, materials explained and provided; were objectives stated? Were the lecturers/resource persons adequate? (It is obvious that the ability to answer these questions varies with the viewpoint and position of the respondent - be he organizer or recipient, for example!)

The conduct of the seminar depends upon similar issues as does judgement on single lessons, sessions, presentations etc., the focus however is different. The seminar/training course etc. in this example is seen as a unit. Evaluation is interested in its logic, sequence and the overall outcome but refrains from indepth evaluation of single lessons. If many teachers/lecturers/resource persons are employed in one single event it must however be asked

(a) whether there was sufficient coordination amongst them to avoid overlap and gaps;
(b) whether the individual presentations fitted into the objectives and requirements determined by the theme of the total event.

Why is this so important? It may happen that a theme is properly set, but the content is not appropriate. What, then, could be wrong with the relation-
ship theme - content? The theme might promise something which is not provided for in the content, such as 'principles of' ..., 'current status of' ..., 'problem solving in' ... and then the theme is not covered by the content if ... : 'principles' are incomplete or not made clear as to where they come in; if the 'current status' is a historical flashback without clear overview and summary as to what it currently is; if 'problem solving' talks about procedures which may contain problems without talking about approaches to solve problems or even teaching skills as to how to do it.

The same applies to content and the appropriate topics of individual sessions covering this content. Here, the relevance of the topic to the overall theme, in the context of the overall content, is of interest. Especially in seminars where the organizer makes use of external resource persons and has little influence on their interpretation of the given task, it can happen that topics are dealt with ineptly. Objectives for the coordinator: Verify firstly the validity of single topics as such, secondly, how they were understood by the resource person; thirdly, how they were presented in terms of
- matching the level of understanding of trainees
- language (important, if teaching language is not the mother tongue of trainees)
- teaching methodology.

He may then find that the topic or the description of content needs modification or clarification. He may have to advise the resource person better or give clearer preparatory explanation to the prospective trainees.

Important in the evaluation is the question of methodology used. Some may already be suggested by the topic itself. If the topic promises to teach skills (... how to do something ...) exercises and student oriented activities are mandatory. More difficult is the decision which teaching methods (such as group discussions, plenary, individual or group assignments, lectures or interactions), with support of teaching aids (such as overhead charts, models, slides, films, kits or tools) are adequate or could be effectively substituted! The methods used depend largely on the desired learnings, the time available and the skillfulness of the teacher.
The sum of methods used altogether in a seminar would allow judgement upon a proper preparation and balance between the time available and the learning objectives. Methodology is of even more concern in individual sessions or modules (a module covering several sessions to deal with one topic). This makes us draw special attention to elements which need to be evaluated in those sessions forming only part of a seminar/workshop/training ... These are the subject matter within the framework of attempted learning objective, teacher performance and learner performance.

The subject matter of a single topic has of course a narrower focus compared with the overall content of the event, which was discussed earlier. In its evaluation is of interest the coverage of aspects, the specificity, and the suitability in the context of other lectures received.

The judgement upon the teacher's performance basically falls into two parts, a controllable one and a subjective one. Controllable in so far as use of audiovisuals, teaching-aids, handouts can be stated; subjective because the efficiency with which these were used may be looked upon differently by different people.

For evaluation purposes of teacher performance one could generally think of the following: His familiarity with the subject, his ability to structure it, to use aids effectively (such as for clarification, summary, reinforcement, illustration, demonstration ...); to speak freely and clearly, using understandable language; his ability to adjust to audience (such as when being asked questions, in discussions etc.), his knowledgeability regarding the background of the audience, special work environments/requirements (example: given different sociocultural environments not all management-techniques are applicable ...). Also, his ability to accept and integrate suggestions from other colleagues, workshop leaders or organizers into his own role is important. Many lectures end in failure because this was not done!

Much of the answers depend on the - always subjective! - potential beneficiary of any training or dialogue, who has his own expectations, likes and dislikes. It is, therefore, important as well to evaluate the learner's performance. This is shown in his intent, creativity, ability to understand, demonstrate, describe, analyse whatever has been the object of learning.
Tests do prove this to a large extent. Yet it is difficult to judge which role the teacher's performance played, what impact he made on the degree of learning. It is likely that the personal performance of a teacher influences the willingness of learners to learn whereas his knowledge and mastery of the subject determines the actual quality of learning. Learners' performance can also be assessed by the teacher which, however, excludes those influencing factors related to himself: He will not consider his own shortcomings and their impact on the overall result.

A word regarding the function of the most commonly used teaching aids, such as blackboard, overhead projector, flipchart, wallcharts, maps, posters, models. There is, no doubt, more sophisticated equipment such as videocameras, language-laboratories etc. However, in the field we dealt with in adult education and training controlled by requirements and conditions in developing countries we rarely found them in use. Either because the equipment was simply not available or the lecturers were unfamiliar with its handling.

But it is remarkable how little teachers/lecturers/resource persons are even familiar with the effective use of the simple available tools mentioned earlier. They, however, influence the degree of learning. (Readability of transparencies, explicability of notes at the blackboard, illustrativeness of charts etc.). They are therefore worthwhile an evaluation to adjust or complement them if needed, or instruct the lecturer on a proper use.

SPECIAL PROBLEMS OF EVALUATION IN TRAINING COURSES ABROAD

There are institutions which provide opportunities to train abroad or facilitate the possibility of attendance in a special (or regular) educational activity in another country. There are a few important factors needing special attention in the effort to evaluate such an undertaking:

1. What is the role of the institution evaluating? To which extent can it get the proper information needed?
2. Who is the person being evaluated?
3. What will be evaluated?

It makes a difference whether an institution functions as the employer and
Sponsor or as the sponsor only. In the first case, the potential trainee will feel a certain responsibility regarding his learning - shown in his attitude to learn probably more than in the latter case. In this latter case, however, the sponsor may have to take more responsibility as to the well-being of the trainee. He stands to be either emphatically praised or blamed for his deeds. Whoever has gone through the process knows that at times it is difficult to get the proper information required in time or to be able to influence certain activities to correct deviations.

Evaluation in the case of sponsorship deals to a large extent with questions of suitable stipends, allowances, living conditions in a foreign country, boarding and lodging. In this case, one must give credit to the fact that living and studying abroad always is linked to some changes in the life of an individual: Customs and habits may vary, the social life may differ. This could require that either sufficient preliminary information is given or special arrangements be made for provision of certain diets (such as: staples, Muslim, vegetarian), social events, tutoring and counselling. Whereas this may be desirable if not necessary, great care should be taken that these special amenities do not put local people or others in the group (say: students in the same course) at disadvantage as this usually creates tension and misgivings.

Description of different lifestyles and environmental conditions should also be such that local people do not see offence or are discredited. It may be necessary to point out to the potential trainee that some of these changed conditions are part of the consequences - and eventually benefits - of going abroad and not automatically a cause for complaint. It is advisable to have a neutral contact person locally who may be openly talked to by either side and can at the same time provide other information needed to make proper judgements. Eventually different people should be heard on the same issue in an evaluation exercise.

Another problem arises in controlling, monitoring or adjusting programmes to the training needs of participants. Care has to be taken in either preinforming the training institutions as to the background and requirements of the students - if the programme is flexible or tailormade, or inform the students properly as to what is to be expected if the programme is not flexible -
such as regular university courses etc. (These requirements for study-programmes are comparable and in analogy to those in short-term training where claim for proper description of objectives was made earlier.) Disappointments and complaints can then be avoided.

In an evaluation it needs to be ascertained that what could have been done was actually done before or during a course to validate the evaluating statements. One disappointment easily leads to a whole distorted picture given by a respondent, tentatively more than can one positive impression upgrade the rest.

**TIMING OF EVALUATION IN TRAINING PROGRAMMES**

There are recommended intervals at which evaluation is usefully done:

1) At the beginning of an event one may ask participants’ individual background and qualification for the course to see whether course content and anticipated target group match. One may also inquire about expectations regarding the learnings and the expected outcome. This will show whether descriptions of course content and objectives were read at all and, if so, were sufficiently self-explanatory. It furthermore gives opportunity to correct wrong expectations or clarify objectives on the part of the organizer or course director to avoid misconceptions and frustrations. Many training courses in fact suffer from insufficiently stated course objectives at the beginning of a course hoping that explanatory material was read and understood in the desired meaning - which is an unrealistic hope!

2) At halftime or - during longer courses of say 6 months and over - at the end of terms, modules, change of location or training institution. This will show how participants are getting on, whether desired learnings are accomplished and expectations are fulfilled. The advantage of those evaluations is that they still give room for adjustments to be made in the remainder of the course.

3) At the end of the activity in order to be able to draw final conclusions. This may involve different target groups besides the trainees, such as lecturers, course director, moderators and others who can contribute to the final evaluation by their observations and comments.
THE DESIGN OF QUESTIONNAIRES

Questionnaires are probably known as the most common instrument in evaluation - but why? Evaluation, we have shown, usually concerns two parties: Those who evaluate and those who are evaluated. Even if it is not a person but a process or a text we evaluate we do not do it for its own sake but for a certain purpose which eventually will involve people. Evaluating a process might imply that we have to find answers to our questions by observation and conclusion (something that was explained in part I). Involving people, we get answers from them. But then, what are those evaluating interested in? In facts, certainly. But these facts can be composed of various things. Assessments, opinions, recommendations, impressions, comparisons and self-estimates. An invitation to comment on a given situation could contain all that. However, it may be needed that a distinction is made between individual, unguided views, and answers predetermined by a given scale of judgement. It makes a difference whether the question is put: "Please comment on the conduct of the training course you attended. What do you think?" or "How do you rate the conduct of the training course you attended within grades 1 to 6?" (We shall discuss some implications later.)

It must also be clear as to what the aim of the interrogation may be:

- To answer questions regarding the efficiency of training conduct, effects of training on people or situations?
- To receive suggestions for future activities (with respect to: participants, content, resource persons, methods, organization etc.)?
- To verify whether preliminary problem- and training need-analysis were correct and aptly translated into the required measure?
- To control whether in the opinion of participants the training objectives were attained?
- To get an impression of the mood of participants, or even to reduce feelings of resistance by giving a chance for critique?
- To find out the acceptability of single training components, organizational aspects or resource persons?

All these options must be taken into account and the art of evaluating is to formulate questions which will meaningfully reveal the opinions of the persons interviewed, indicate probability and veracity of the answers and
allow for conclusions as to any shortfall in the past activity and in view of changes required in the future.

Based on intentions pursued by the evaluation the proper question has to be given, providing a framework of reference or marking criteria; or the evaluation must deliberately avoid any guidance and presupposition. The evaluator must know whether the answer he is expecting requires interpretation - which creates the need for comparable categories - or whether the answer of individuals fits into a predetermined frame. Likewise the evaluating party must be certain about the task given and must eventually be guided to think in prescribed categories.

There are some rules which should inevitably be observed when formulating questionnaires:

1) The interrogator should clarify meaning and purpose of each question for himself before writing.

2) The formulation should not allow for misunderstandings, should be simple and clear instead. Can the expected answer carry a meaningful message?

3) The level of language should be adopted to that of the respondent.

4) Preferably, the formulation should consist of a full sentence.

5) Questions should be formulated such that respondents are not tempted into routine answers.

6) The length of a questionnaire should be well balanced to avoid a tiring effect on the respondent.

THE RELIABILITY OF A QUESTIONNAIRE

There are potentials and constraints in the use of questionnaires for evaluation. All evaluators should know that any questionnaire, meticulous in phrasing and criteria as it may be, is never objective. This granted, it yet allows for a range of results which may reach from conclusive to manipulated! One must know that the mood of participants at the moment of evaluation will greatly influence their judgement upon the course content. The evaluator, knowing his aims and the questionnaire may particularly emphasize points which would otherwise not have been considered by respondents. He may invite
open comments or add pointed questions. He, too, has the possibility of cross-examining statements made by respondents to check their veracity. It is important to keep in mind that many participants to training answer favourably as a matter of politeness (especially in short-term events, not necessarily so in long-term events when much of their day to day life is affected in one way or the other over a length of time). Others forget details which are asked for in the evaluation and give an answer at random.

It should be noted that many cultures consider critique as something negative, something which brings out deficiencies, inadequacies, shortcomings, wrong behaviour etc. To express critique is, therefore, thought to be socially unacceptable and bad manners. Knowing this evaluators should take particular efforts in explaining the purpose of the evaluation and the necessity for honest answers, showing the positive and constructive elements of critique. Likewise, an evaluator must assure the evaluated party that his/her contribution is treated confidentially so as not to create fear of any repercussions or reprimands.

As an evaluator one should also take into consideration that a positive judgement upon a training without specification of its foundation, or upon a resource person does not necessarily mean that the participant has definitely learned anything. One is still required to find out if and what. Experience has shown that participants found an atmosphere pleasing and themselves confirmed in the lectures from which they had no actual gain in knowledge - but their judgement was positive. (Which means, that this target group was probably overqualified!) However, the picture is reversible: Negative impressions and judgements need not automatically rule out learnings. Stiff assignments, hard and long working hours may cause this critique yet leaving behind real learning even at the cost of general personal well-being! But these learnings, the positive side of the training, participants may only realize much later.

Lastly: Learnings and practicability/applicability are two different things. The objective will tell what should be achieved. Either can be and must be evaluated, most likely in separate efforts.
PHRASING QUESTIONS - PHRASING ANSWERS

We distinguish different kinds of questions according to options in the answering. There are those which allow for any free answer (which subject interested you most? What do you suggest should be changed?). The person is free to answer on grounds of his/her own reasoning. This type of question should be used if many answers are possible or when suggestions are expected. But those answers are difficult to evaluate in a final, summarizing effort. The answers could also be made more specific in adding "Why: give reasons" to the questions - which, however, does not guarantee a proper or helpful response.

There is a wide range of other possibilities to suggest answers to given questions. Those can either be verbal or in a scale or grading system.

Still in wide use is the type of question which allows for only two answers: Yes - No, but there are actually very few issues which can be sufficiently and explicationarily answered by those categories. It may work when asking:

"Did you read all the handouts/resource materials?" - "Did you understand the objective of the unit?" - Already the question: "Did you find the material suitable?" leaves open for which purpose, if "yes"; and why not, if "no". To reach better qualification of an answer, certain categories may be given, such as:

Too difficult ... too easy; too much ... too little ... just about right.

(In)sufficient, (in)adequate, (in)appropriate, (not) helpful may be others. But it should be observed that the question always provides for a specific purpose or reason: Was the method used to teach a .... skill: appropriate / helpful / not appropriate - meaning: 'in view of its capacity to teach a skill'. Though a subjective answer still, it is clearer than the unspecified question: Was the method used appropriate / inappropriate; helpful / not helpful; too much / too little; just about right, ... because it leaves open for what purpose - demonstrating something - clarifying something - my personal way of learning etc.

A number of questions can be answered by scales, points or grades. Scales usually give options on the positive and negative side starting with zero:

very bad: -3 -2 -1 0 +1 +2 +3: very good.

(A problem may arise in the understanding of "0": does it stand for 'average' or 'no opinion', and it is wise to indicate either in the questionnaire.
Grades may simplify the request: How do you judge the presentation?

Grade 1 stands for: very good
2 for : good
3 for : reasonable/average
4 for : not satisfying
5 for : bad

Points may reduce the number of options: How do you rate the efficiency of the seminar administration 0 - 3 points:

- exceptionally good = 3
- satisfying = 2
- not satisfying = 0

This scheme may be used when comparative experience can be assumed (exceptionally good = better than what one is used to under similar circumstances) or when special needs of participants had to be met (which might be papers to be typed ... as well as special food arrangements with the caterer etc.!).

The advantage of all three evaluation schemes is the easy handling of answers received by the evaluator for grouping and structuring purposes. They are appropriate in cases where contrasts are expected within which grading is possible. They do bring a heavy emotional component into the evaluation which the evaluator has difficulties in interpreting. He does not know whether for one person questioned grade 2 stands for "average" or "almost perfect". Even if explained grade 2 could still have two different meanings for two different addressees. In grades and points there is, furthermore, no clear division between positive and negative judgements - unlike in scales where 0 can stand for the turning point.

In practical evaluation one may decide for a combination of several methods in putting questions and answers. One approach should, however, strictly be avoided: To use only one scheme. Remember why:

For one, it has a tiring effect and becomes routine easily. If, for example, a participant has a "generally reasonable feeling" about the course he will be tempted to give the same mark, point or tick to all questions without much differentiation. If he is dissatisfied with something, he may just do the same to all questions because "he wants to let them know that he is displeased"!
If, however, one is asking all questions open ended or requires too many explanations, the respondent before long dislikes the 'too much thinking and writing'. He will drop questions accordingly and write his answers in abbreviated sentences which often prove little helpful.

Second, the 'open question' which will never lead to any statistically workable result; the 'yes - no - give reason' which would require that comparable criteria for the yes/no/reasons have to be patterned by the evaluator after the answer was given - manipulating the result; or 'scales' which never allow the addressee to give his own reasons.

Before we go into examples of questionnaires we may make mention of one pleasant form of daily evaluation: The "moodmeter". It is symbolized by a barometer and after each day participants are requested to indicate with a dot how they felt which may well be a mixture of personal feeling and the impression left by the daily training proper. It can be an interesting indicator for an organizer or course director, particularly if there are misgivings of some kind which need immediate action. It is thereby acceptable that for the sake of fun participants would follow a trend. Yet it shows signs of boredom after too long working days, dull sessions, frictions in the group etc. One should only make sure that people coming from hot climates understand the preference for hot climates of people from cooler areas accordingly who would not show appreciation for -30° which those from the tropics imagine they would and tick 'well-being' right there!

If these "moodmeters" are prepared every day one can extrapolate a "mood curve" over a period of time.

<table>
<thead>
<tr>
<th>Interpretation:</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most people felt quite alright (amount of dots around +5 to +10), few felt excellent and a few are apparently dissatisfied.</td>
<td>+15</td>
<td>+10</td>
<td>+5</td>
<td>+10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
EXAMPLES FOR SETTING UP QUESTIONNAIRES

We had earlier on mentioned that essentially 3 sets of questions are of interest for the evaluator regarding 3 phases: preparation, organization and implementation. As to the preparation we may be particularly concerned about timing and possible difficulties encountered by the participant. Here a few questions:

- How many weeks prior to the seminar did you receive the invitation:
  >8  6  4 <2  (if this is of relevance)
  or simply leave space: ..........................

- Was this time sufficient to acquire the necessary travel documents (passport, visa, ticket), foreign exchange
  yes ☐  no ☐  (not for ....)

- If "no" how much more time would be required?
  .... weeks

- Which specific problem did you encounter?
  ........................................................

- Have all materials which were sent out reached you?
  yes ☐  no ☐

Those and similar questions - depending on the invitation and recruitment procedure, the travel requirements etc. should help the evaluator to

(1) see whether his arrangements were appropriate
(2) acknowledge complaints for rectification
(3) receive recommendations.

They enable the addressee to talk about his personal experience. Therefore, different kinds of schemes for answering are suggested.

The second group of questions concerns the organization. Hereunder fall facilities/logistic support/board/lodging/administration.

Many of these questions will most likely be accompanied by either a scale, a grade and/or a verbal classification: excellent - poor, appropriate - inadequate, helpful - no assistance; this verbal specification would depend on the evaluator's interest. If, for example, he is testing a new
venue versus previous ones because he has special requirements for workshop rooms, aids etc. he may add the "appropriateness" to his scale to make the addressee think in these terms rather than the size of a lecture hall and the comfort of chairs only! The same may apply to staff being specifically involved in all kinds of services and under time pressure. It is not only their presence - rather: were they helpful to individuals in the judgement of those?

Suggestions:

<table>
<thead>
<tr>
<th>MARK</th>
<th>GIVEN 5 CATEGORIES ONLY THESE ARE POSSIBLE RANKINGS OR MARKINGS</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITEM</td>
<td></td>
</tr>
<tr>
<td>Sugg. 1</td>
<td>food</td>
</tr>
<tr>
<td>Sugg. 2</td>
<td>lodging</td>
</tr>
<tr>
<td>Sugg. 3</td>
<td>lecture room</td>
</tr>
<tr>
<td>Sugg. 4</td>
<td>logistics</td>
</tr>
<tr>
<td>Sugg. 5</td>
<td>socials</td>
</tr>
</tbody>
</table>

It may be advisable to add a slot where people can give their remarks, comments or suggestions if they like to. They may wish to say "thank you to ...". "There should be rice more often", "Why not have a bus to town in the evening" etc.

Those comments can not only be useful for the future, they may also enlighten on reasons for a specific classification: Not the quality of food altogether, just the lack of his/her staple rice may cause a person to grade food "poor".

Again, if evaluation is undertaken on large scale those "extras" can hardly be entered into any statistics and should be avoided where permissible.

However, in evaluation of training where numbers of responses are still within manageable size and less anonymous, they are essential to help in any attempted improvement. They will also help in singling out notorious complainants which are not representative.
The last, probably most difficult and complex group of questions concerns 
the implementation. The overall judgement thereby should be placed well at 
the end of an evaluation. This gives the addressee an opportunity to think 
about the various components which help him form this judgement. Those may 
be four themes:

(1) The participant (his qualification, preliminary knowledge, expectations).

(2) The content (structure, difficulty, practice orientation, learning 
objectives ...).

(3) The methodology (aids, teaching methods, resource materials, exercises, 
excursion ...).

(4) The resource person/teacher (presentation, versatility, ability to sens-
itize audience).

Now, what could any questions and their answers in each of these areas reveal? 
We shall illustrate this by means of some examples:

The participant:

1) Please indicate your qualification (highschool, college, university).

Lots of a participant's judgement upon a course is dependent on his 
qualification - complaints about too much or too little "new" material 
could indicate under- or over-qualification.

The following question can therefore help to clarify:

2) What was taught in the course was:

    well - little - not at all known to me

The answer will depend on previous knowledge, qualification, training need.

3) The question: Who initiated your participation:

    yourself - superior / institution / organization

is relevant to draw conclusions as to the motivation of the participant, 
supported by the question:

4) What do you expect from the training (preevaluation) - what were your ex-
ceptions in the training ... Have these expectations been fulfilled? 
(postevaluation)

    (yes / no / partly); please explain where they were fulfilled .......

    please explain where they were not fulfilled .......
The answers show attitude and motivation of the participant towards the learning as well as his preparedness to help in making alterations.

**OTHER FORMS OF EVALUATION IN THE CONTEXT OF TRAINING**

Besides from questionnaires there are other forms of evaluation. Some of them are described in the following. There are those which can be recommended while a training takes place called group exercises. So one can ask 3 or 5 people to discuss issues which they find remarkable about the training, their personal impressions, feelings, expectations, wishes, likes and dislikes. They will then choose one spokesman to report in the panel.

The advantage of such an activity is that participants can talk about subjects they consider most important. The reporting may reveal concerns which were probably overlooked by the course director or organizer. Dividing a large group into a smaller one, furthermore, may give a chance for presenting a wide range of topics and eventually a more realistic insight into the frequency of opinions or complaints ... (This may be in contrast to general discussions where 'opinion leaders' could distort the real picture.) With this method one can however not rule out that the spokesman of the group gives more of his own views than those of the others.

The freedom of participants to select issues of their own choice holds the chance that not all relevant issues are discussed. This may happen when there are questions in which the course director is particularly interested in for reasons not obvious to the participants.

A modification of this exercise is to advise the small groups beforehand which issues to discuss. This means that the reported themes are more predetermined. A good evaluator will probably decide to use both methods to give credit to either advantage - provided he has time. Either method requires considerable time. The more thorough the fact finding and reporting should be, the more time is needed. Twenty minutes for group discussion and five minutes for reporting of each group easily takes an hour in a course of 25 participants.

Many evaluators still favour a general discussion. It is certainly a useful
instrument, however best or most effectively used only as a complement to another one - most likely the questionnaire.

In the combination advantages and disadvantages of a predetermined and an unstructured procedure can best be balanced. Yet, to run an open discussion could pursue different objectives:
1) To freely let people talk about their concerns.
2) To prepare for a more systematized and structured interrogation (such as questionnaire) if held at the beginning, and to eventually capture those aspects which are not covered otherwise.
3) To sum up aspects which participants feel were not covered in previous undertakings, if done at the end.

Moderators or responsibles for a course should clarify for themselves which position they want to take: A neutral or passive role which merely encompasses the sequencing of statements, or that of a - legitimately - biased person towards one interest group, such as the organizers of the course. In the latter case it should be expected that he or she can and will competently answer questions from the trainees as to why certain things were or were not done. Those questions could indicate to an honest evaluator that other concepts or perceptions could have been thought of or were instigated by certain steps which are worth a consideration. What should not happen, however, is that moderators switch from an initially passive role to a talkative, defensive role when criticism is raised. Unfortunately, this can often be observed. What happens then in a general discussion is that more of the moderators' views surface than those of the participants. In such a situation the real intention of a 'group discussion' is definitely missed.

Yet another modification is an evaluation wherein participants are given postcard-size cards to be filled with "keywords" under the two head-questions "What did you like/what did you consider positive?" and "What did you dislike/consider negative?" Accordingly, people will write anything that comes to their mind in one word (keyword) on a card and pin it (or have it pinned by a moderator to ascertain anonymity) to a board. Example: "like" could then contain "socials", "excursion", "lecture of ..." - "dislike" could contain "long working hours", "assignments", "pocket money".
Thereafter it is the task of the moderator or the joint group to identify themes categorizing the responses, such as: which ones belong to

- preparation of the course
- implementation/presentations/learnings
- facilities
- administration

The responses thereafter are clustered. Duplications should not be removed. They show a certain frequency and relevance of concerns. As, however, the wording of different respondents may differ, it is never clear whether people are talking about the same thing. (Even if they use the same words this may happen!)

Example:
Negative mentioning of "assignments" could mean: 'too many', 'too few', 'not helpful for the learning', 'not well explained by the moderator', 'results not discussed in the panel' etc.

In the reverse: the positive mentioning of "lecture of ..." does not say why - such as 'lively', 'straight to the point', 'new knowledge', 'interesting approach', 'teaching aids used' etc.

These meanings would only emerge if the clusters were further discussed. Then they have a different function: They are brainstorming for structure and sequence - if clusters are prioritized - in the discussion to follow.

This method still holds the chance that items which are of particular interest to the organizer, do not come out. It could become a critical situation where p.e. a course director has introduced a new portion or modified an old one, changed resource persons etc. and is interested in a particular effect of acceptance. If "lectures" then were felt generally interesting, no particular issue may be mentioned. In such a case it could be advised to separately evaluate this element with a different method at a different time.
Conclusion:

On the whole it must be stated that particularly in training courses the length and intensity of evaluation is determined to a large extent by the length of training. After a three day meeting one will naturally ask less detailed questions compared to a four weeks' or six months' training. Oral investigation may do but is difficult to statistically be assessed. Preference will be given to a short, i.e. one page questionnaire. While it is easier to handle, it leaves much unattended.

The longer the course, the more investment in preparation, effort and money we assume. This demands for and also justifies more detailed evaluation. At different stages different evaluation instruments - as described - can be applied. This does not only help in providing more variation and accommodates different preferences to voice out personal opinions, it also serves different purposes: Depending on needs and interests different aspects can be questioned at length. The important thing is to ascertain that questions asked are addressed to the competent target group and are formulated clear enough to yield the explicable answer without prejudicing or manipulating something.

Distant Follow-up Evaluation

The situation may occur that a particular training activity has passed for some time which was designed for a specific purpose and practical application. It is known that participants still being under the immediate impression of the training have a self-assessment in regard to new learnings and professional gains which is still tainted, either being too enthusiastic or too vague. Therefore, one may decide to evaluate the long range outcome in terms of applicability and effectiveness after some time. It could either be done in writing or through interviews. Thereby one may consider to evaluate the performance of the former trainee as well as effects the performance had on his work/productivity/environment ever since. For this purpose the evaluator could also address superiors and colleagues.

To start with we shall concern ourselves with evaluation in writing, questioning the former trainee. First of all, one should destroy any il-
lusions as to memories of details on the part of the addressee. Depending on the time lag between training and the interrogation he may possibly be able to say why he came. Was it — in his own assessment — to learn something new or to gain more proficiency — or was it just for attaining promotion so that training had counted for credits only regardless of actual learning. He may eventually recall what was the most relevant theme dealt with in his eyes. This need not be identical with the original intention of course initiators! However, practice back home may reveal different learnings which consolidate or surface as something useful and applicable. At hindsight former participants may say which learning they found particularly helpful and stimulating.

These statements of self-assessment do however not take into consideration other influences or exposures which have strengthened the learning. It will also be difficult if not impossible for an individual to assess the effect of his own performance. Any statement in this regard must be very subjective: The person may feel more secure or self-confident; whether this actually improves the quality of performance must be left to answer by other competent people (such as his superior).

In such a questionnaire it can prove useful to ask whether there was exposure to any other training of the same or similar nature to calculate the respondent's competence in comparing and distinguishing items he is asked to judge upon in the evaluation.

Lastly one will ask for suggestions in regard to any changes: If, however, the evaluator is expecting arguments concerned with the content of training in the response, he will be disappointed! In the overwhelming number of cases 'content' is no longer remembered; what is remembered instead even after a long time is the personal well-being. So, comments like "increase the pocket money", "give more time to relax", "have more social programmes" are quite common.

Especially these late evaluations reveal how important it is to attend to the 'non-training-related' conditions sufficiently. On the whole a follow-up evaluation with people who are not specifically trained for it and prepared to give relevant answers meet with some bias. Follow-up evaluation therefore holds limited explicitness in its responses. Exempted are those cases
where evaluators or training institutions were able to keep close track on their candidates even after training.

What can be asked in the follow-up evaluation - likely to be undertaken after one year to yield information on professional experience are

a) Questions related to the current status/position of the person: Employer, field of specialization, possible changes due to the training, promotion.

The answers will be stating facts. They do not give causes (such as 'promotion was due to this particular training'). So it is left to interpretation whether and to which extent the training contributed to a particular factor.

b) Questions related to memory in regard to the content of the course: Memorable themes, teaching methods, teachers etc.

In case something novel had been tried in the activity under surveillance, it may be interesting for the evaluator to see whether this actually was received as such and figures as something outstanding even after some time.

c) Questions of self-assessment: they are concerned with assumed learnings, improvements of performance, increased competence, acceptance by colleagues.

These answers are clearly subjective and need not reflect the truth. Why could these questions be interesting? Answers may show whether former participants have observed themselves consciously as they had an expectation in the effect of training and/or an appreciation of the learning. These could validate earlier statements regarding "expectation in the training".

In phrasing respective questions the evaluator should see to it that he is as specific as possible. He should avoid questions like "Do you think you gained professionally from the course?" in favour of more concrete such as "What specifically did you learn / could you apply / has changed in your performance?" Otherwise the answer will be just "yes" / "no" without giving further reason.

But very few people will remember at all, least if the training was short and not any significant milestone in the array of professional training received by an individual.
In this context we may make mention of an interesting insight the German Foundation for International Development gained when evaluating a series of different training programmes offered over a period of ten years. Prominently among those figure graduate study programmes for students from Third World countries which were held in various foreign countries. Realizing that they had very little, if at all, exposure to other countries, peoples, cultures, thinking, behaviour they stated personal benefits and gains as the most important thing looking back after some time. So the professional gain fell back behind the latter. (See: Experiences with Evaluation and the Evaluated, OOK 1418 A + A/a)

The last category of questions to be discussed:

d) Questions regarding recommendations in view of past and future activities. Hereunder would fall any ideas relating to intensification or omission of subjects, time-allotments, instruction, practice and research, guidance and follow-up - as far as the professional side is concerned. A second set is made of recommendations referring to the framing conditions described above. In respect of future events any proposal would be welcome and invited through an open question: "Do you have any suggestion for a further training (subject, purpose, target group, location, duration etc.)?"

This last part may not contribute much to the evaluation as such but indicates to the respondent an appreciation for the opinion of a former trainee and is a useful opportunity to get a first idea on future training needs.

It had been mentioned that follow-up evaluation to training measures should not only embark on the trainees' opinion but should also seek that of people surrounding him/her. Obviously the immediate superior is the best reference. Why? He should have a perception of the work that needs to be done and an impression as to the abilities of the staff member working on it. Ideally he knows what needs to be done and what is done at present and has an idea which gap in knowledge and skills must be filled by means of training. While he can not be expected to know how this learning is carried across - this being the responsibility and professional skill of a training institution and the teacher - he has an idea as to the final product or outcome. Therefore, the questions geared towards evaluating the effect of training should ask for the changes in performance which are visible. Phrasing of questions is not so much embarking on "what is a person doing"- "what are the changes needed" ..., rather "how does the change
show" ... "is it noticeable", to describe the deviation from a state observed earlier.

If it is necessary to write a questionnaire, it will be useful to provide for categories as most of the respondents are unexperienced in answering this type of questions. It is often misinterpreted as being an assessment of an individual only - and therefore treated with utmost care and even apprehension - rather than seen as one necessary element in evaluating the training effect on a person and his/her work. Therefore the respondent has to clearly understand the evaluator's interest in attributing performance and outcome to training. The evaluator himself is the link between information provided by the trainer's side as to the intentions of training and the employer's side as to the actual or desired effect. (This dual position with all its implications has already been discussed in chapter I.)

Interviews

Yet another means used for evaluation is the interview. It holds an obvious advantage in that it is very lively, can explain, correct misunderstandings and encourage interesting statements. The difficulty lies in recording the results, categorizing them and make them comparable. If different interviews are chosen, they may not only have a different understanding of their task but also employ a different style. The feedback then needs interpretation through the responsible evaluator. Contrary to many beliefs interviewing requires considerable skills to ascertain that the interviewer knows when to talk and when to listen, when to cross-check, reemphasize without manipulating the respondent or impose on him. Inexperienced interviewers may furthermore be carried away by subjective statements of interview partners who have strong opinions or are eloquent.

The more interviewers are needed (for example in large scale evaluations), the more difficulties will arise in guiding and training them towards one approach and one objective, and the more difficulties will arise for the consolidating committee or the specialist in electronic data processing to work out the feedback into something tangible and meaningful.
A distinction can of course be made between an interview on the basis of a preformulated questionnaire and an open interview. Preformulated questions determine the course of the interview and its length but may possibly overlook concerns or arguments the respondent could contribute. To avoid different nomenclature used by interviewers the questionnaire could prescribe valuing statements or categories for which answers are expected similar to those given in "The Design of Questionnaires" (see p. 52 ff).

The advantage of an interview with questionnaire over a mere questionnaire is described at the beginning of this chapter and in fact does constitute a difference.

We must however acknowledge that interviews in prescribed categories do contain very little conversation which comes closer to the real meaning of interview. To give more credit to the benefits of 'exchanging views' one may therefore consider open interviews. But it is only for the very skilled and experienced evaluators to get something meaningful out of such an exercise which can yield relevant feedback. Even this will always be extremely subjective, very much depending on a person's perception, interpretation and familiarity with circumstances and background. A person to whom the latter are unknown, may overlook symptoms or hints given in the conversation; an insider may overinterpret them or make them fit to his personal perceptions. Yet, open interview has a positive side to it when chosen in combination with another instrument: Interview can bring out notions which no questionnaire (or even group discussion) will reveal. Reviewing questionnaires used in follow-up evaluation one can observe that often evaluation relevant aspects were forgotten by the respondent. In such a case the questionnaire is returned blank as there is no further explanation or inquiring possible. While interview with questionnaire would essentially follow the same structure, an open interview is in a better position to inquire here and there to uncover something relevant which was unconsciously remembered but not captured in the written question. Precondition for such a 'success' is the evaluator's fairly clear idea what information he is looking for, which is not easily explained in an ordinary questionnaire. Whether he will be able to make use of this information later, will show. It certainly has very little statistical relevance. The effort and time put into open interview may not always pay, but given a chance it should be well prepared similar to any other instrument and will most likely need some guidelines for the interviewer.
Interviewer's Guideline

The assumed task is to evaluate the effect of one or several training programmes offered over a period of time to staff members of selected institutions.

Following is an Interviewer's Guideline expounding on the purpose of the interview complementing a questionnaire used parallel. Whereas the questionnaire serves the purpose of yielding comparable answers and indicates areas where clarification on the issue is needed, the interview should further bring out this clarification and particularities which may be subdued by the questionnaire.

Such could be: Special features of management or personalities in the decision-making process which have an influence on developments in an institution or impact on the attitude of staff, thus promoting or hindering impact of training on an institution.

The interviewer now has to be guided by the purpose of the evaluation into whatever he is looking for in the interview:

First of all, the interviewer should give a short statement in writing on the overall assessment of the institution visited and the staff met with regard to attitude, competence, professionalism, environmental influences as far as those are detectable.

It is clear that these assessments are subjective in nature, but may help to set certain answers into proper perspective in a comparison of countries or institutions.

Whereas it is necessary to initially interview former participants to training courses in the effort to see any impact on them, the visits to the institutions should further reveal work reality and environmental conditions under which development and change take place. Interviews with directors of institutions and colleagues of former trainees therefore have special meaning.

It must be assumed that those who have not undergone training do not know the details of what really can be accomplished, that, however, they do have distinct ideas as to what they themselves expect and what they need. Ideally
the expectations are fulfilled when the needs are met. In reality this need does not necessarily coincide with what actually has been taught or learned in the training courses.

When interviewing the director of a selected institution, his answers should therefore yield the following:

Information on facts such as the mandate of the institution, the main activities undertaken, the available manpower with details on educational and professional background. This information should enable to relate to the director's expectations in staff performance with regard to
- fulfilling certain assigned functions
- training with respect to the effect it should have on the individual trainee after his return
- the effect which will be shown in the trainee's performance having an impact on the institutional performance.

Criteria and facts are sought which describe best this expectation.

Next, criteria and facts are looked for, which describe a director's assessment of impact or change. Qualification of an individual's performance and qualification of institutional performance are surveyed. The interview should reveal how impact is assessed:
- in quantity and quality of work
- in cost reduction
- in increased productivity
- in characteristics of the trainee's performance after the training, such as
  - higher flexibility
  - self-confidence
  - competence
  - professional attitude
  - job satisfaction
  - cohesiveness
  - leadership etc.

Can the respondent make distinct comparison between effects of different courses on individuals or in the effects on his institution? The respondent should expound on his policies and his actions after a trainee came back.
Did he take action on the assumption that the trainee is qualified for a certain work or did he do so on the evidence of change?

Is what he recommends for change in existing training, based on detailed knowledge of what has been trained, but does not correspond with reality or is it simply based on his institutional needs and job requirements regardless of learnings which an individual trainee brought home?

This question can be explored especially in those cases where several staff members from one institution have attended the same course expectantly with different results.

The evaluator should be able to draw certain conclusions from these answers, namely in comparison with those received from former trainees as well as those received from institutions running the actual training courses. Training objectives and training results should be considered. Selection criteria and educational background should be compared. Statements of trainees should be thoroughly checked, particularly in regard to their own assessment of gains as listed above. How do they see themselves before and after training? Their performance in the context of institutional requirements, their placement, their treatment. Do they have any substantial criteria for comparison (such as with regard to the conduct of training courses, the impact it had on themselves or colleagues, and policies which were applied within the institution after return)?

The interviewer must also know that very little information is available on professional exchange among former trainees and how they knowingly and deliberately complement each other's work. Only general information is available on training needs of individuals. Their own assessment (according to questionnaires filled in) is rarely directed towards specific skills or function of training. Subjects recommended for training tend to lack details of what is particularly needed and for which purpose, therefore no recommendations as to content, structure and learning objectives can be given. Any statement made orally or in writing should therefore be attended to in this respect by an interviewer.

Explanations as to what is useful and useless should be sought as well as justifying arguments.
Description of work processes before and after training should be collected to be able to measure the degree of learning.

Many of these concerns seem to be easily phrased in a questionnaire. Why, then interview? Because the answers may be incomplete and not self-explanatory. This is where the interviewer can enlighten further.

The interviewer should attempt to figure out the abilities which have possibly been created by training, but furthermore the inabilities, the deficiencies remaining to show where additional training needs and specification for training objectives might emerge.

On the basis of those factors recommendations can be made the beneficiaries of which could be employers, training institutions, trainers, prospective students, depending on purpose and intention of the evaluation exercise.

The interviewer must perform as the skilled person to pull out facts, explain or fill gaps in statements when and where necessary without distorting the meaning of an answer. A responsible task as is all evaluation.
EXAMPLES OF QUESTIONNAIRES FOR EVALUATION EXERCISES

In the following we shall present and comment on some examples of questionnaires. Those were collected during conferences, workshops, seminars and in follow-up activities. They show in practice what has been explained and described earlier. They also allow for comparison. The selection does, of course, not imply any final judgement made upon quality or appropriateness. Much may depend on a particular situation in which or for which evaluation is undertaken.

To make single components of a questionnaire more comparable a grouping has been attempted reflecting major issues in an evaluation exercise. Depending on the structure of an individual evaluation sheet boundaries could be flexible.

To start with we shall compare some RATIONALES given with the questionnaire. It is noteworthy that this part frequently is not paid much attention though the participant might well wish to know why this evaluation is undertaken, what will be done with the data, the handling of data (anonymity) and may be motivated to answer if he is asked for his opinion or suggestion.

Examples:

(1) NAME OF COURSE ..............................................................

The purpose of this questionnaire is to obtain information on your opinions and impressions of the course you have been attending at ..... in respect of its relevance, importance and usefulness to you and to your Organization. Such feedback will assist ... to improve on the Course, i.e. its content, delivery methods and organization. Please be as frank and specific as possible when answering. The questionnaire is confidential and for ........'s use only.

(2) Results of the workshop

By filling in this final questionnaire you are requested to judge the organization, objectives and the subject matter, the methods and means of presentation and the overall value of the workshop as a whole.
(3) **Purpose of administering this evaluation form is to collect data from the participants of the Course. The collected data will be analyzed and utilized in presenting the Evaluation Report to ...**

In this instrument there are eleven items. Some items will require you to tick one of the suggested responses which best expresses what you know or feel about the phenomenon. Whereas in others you will be expected to write in the spaces provided. You are requested to read the instructions for each item or set of items so that you may respond appropriately.

(4) **In this questionnaire you are requested to describe your impressions of the progress of the workshop. This is of special importance for enabling the workshop organization to take up crucial or difficult topics once more and to remedy any organizational shortcomings quickly.**

This questionnaire should allow you to take part in the development of the workshop through criticism and suggestions for improvements.

(5) **This questionnaire is intended to assist in the assessment of the effectiveness of the Curriculum Development Course in terms of relevance, lecture presentations, practical assignments, time frame, course organization and administration.**

Please respond to each item as honestly as possible. Your answers will remain anonymous.

Comment: In example (1) the respondent is given a quite explicit explanation as to the purpose of the evaluation and the multiple use of the data. One may add instructions (3). The rationale in (4) clearly indicates the time of its being administered: Formative evaluation! The process is still on and could be modified or remedied.
ORGANIZATION, PREPARATION, EXPECTATION

We had pointed out that the procedure of invitation and provision of information regarding travel, accommodation, administration etc. require special attention at times.

Following are two examples how to deal with it in the evaluation.

(1) 1. Invitations have been issued via the Embassies of the ... or directly by ...

   When did you receive the invitation?
   July August September October

   2. Were there any difficulties with the invitation procedure?
      No 
      Yes 
      If yes, please specify ...........................................

   3. When did you get your ticket?
      .................................................................

   4. Had you any difficulties in getting your ticket?
      No 
      Yes 
      If yes, please specify ...........................................

   5. Did the Project Description give you the information needed for the seminar?
      No 
      Yes 
      If not, please explain ...........................................

.................................................................
Comment: The detailed questions in (1) suggest that the evaluator anticipates problems and differences which he may be able to avoid next time if he knows facts and reasons "please specify...". The second (2) suggests areas of concern, is even hypothesizing, to which fellow participants can or cannot agree. In fact, this questionnaire was developed by participants who made the statements which were verified in the evaluation. In this approach the evaluator must be open to concerns of participants. The provocative if not negative statements allow for the conclusion that these were the "weak" points which the participants wanted to talk about. There is no explicit statement as to the positive things that worked out alright in the preparation which could be of concern to the organizer who may have taken special care of certain areas. (compare with information sought in (1)).
ATTAINMENT OF OBJECTIVES

The attainment of objectives is of course one of the key issues in any training. Evaluation tends to concentrate on different aspects: Overall objectives relative to what had been promised in the course outline/invitation; objectives relative to individual expectations of a participant (1, 2, 4); objectives in conformity with the subject matter (6, 3); specific objectives within single topics, course modules etc. (6, 7, 8).

Depending on how the question is asked the evaluator will get a meaningful answer. How much do we demand of the respondent? How much is left to personal interpretation?

(1) Objectives and subject matter

To what extent was the workshop conforming with your interests?

☐ completely
☐ to a great extent
☐ to some extent
☐ not at all

If yes: Please give reasons: .................................................................
..............................................................................................
..............................................................................................
..............................................................................................

From your perspective: how well has the programme met the objectives agreed upon (after participative planning)?

☐ very well
☐ well
☐ partly
☐ not at all

If yes: Which objectives have not been met?
..............................................................................................

Comment: (C)

How will the evaluator know what the interests of the respondent were? (comp. (2))

C: Can we be sure that evaluator and respondent talk about the same objectives? (comp. (8))
(2)

1) What did you expect to gain out of this workshop? (state in brief)

2) To what extent were your expectations fulfilled? (Tick appropriate)

3) To what extent do you think the knowledge gained during the workshop is applicable to your working situation? (Tick appropriate)

C: Personal assessments of attainment of objectives with a mix of open question and quantifyable scale.

(3)

2. Was the structure of the working steps suitable for achieving the objectives of the workshop? suitable ( ) ( ) ( ) ( ) not suitable

3. Was the visualisation approach of assistance to the working process and its documentation? assisting ( ) ( ) ( ) ( ) not assisting

4. Did your personal contribution find sufficient attention
   a) in plenary session sufficient ( ) ( ) ( ) ( ) not sufficient
   b) in group session sufficient ( ) ( ) ( ) ( ) not sufficient

5. Was the composition of the group suitable for dealing with the objectives? suitable ( ) ( ) ( ) ( ) not suitable

6. Did you feel at ease during the workshop? at ease ( ) ( ) ( ) ( ) not at ease

C: Relevant questions, prescribed categories for the purpose-oriented answers but what of those 5 empty brackets? What is their meaning for the respondent and, upon return, for the evaluator? (comp. 5-8)
(4) Do you feel that you personally benefited from the conference?
Yes  No  If yes, in which aspect?

If no, why?

Is there any experience you made from which the institution you are representing can benefit?
Which one?

C: The benefits for an individual could be different from those for an institution. An indication of either could also be an interesting follow-up question later on ("did it come true what you then thought?").

(5)

Using the Environmental and Agricultural Science Syllabus, develop teaching materials for Grades 4 and 5 by writing, trialling, evaluating, re-writing.

1. How successful was this Workshop in meeting this aim?
  Very successful  Successful  Fairly successful  Not at all successful

2. Did the balance between practical and theoretical activities during the Workshop meet the general aims of the Workshop?
  Yes  No

If not, say why?

C: As we see in question 1 there were a number of very complex objectives for this course, requiring different skills. It can not be assumed that those were attained equally well and are judged upon in one answer.

Note: The respondent is apparently not expected to judge upon his own performa
10. Assuming that your interest in the general theme of this Conference motivated you to attend, you are requested to make an assessment of the relevance of the specific topics which had been identified for deliberation in working group sessions.

11. Moreover, please evaluate how the working group as a whole dealt with each topic.

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C: An interesting division between relevance and evaluation. 'Relevance' presuming competence of the respondent to judge upon it, evaluation dealing with the actual presentation.
Helps to verify why did you design and specific presentation/methodology/teacher performance etc.

(7) Objectives

From your perspective: how much has the programme met the objectives of the workshop?

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<th>(weighting)</th>
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<th>well</th>
<th>somewhat</th>
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<td>3</td>
<td>11</td>
<td>1</td>
<td>-</td>
<td>1.06</td>
</tr>
<tr>
<td>concrete evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>proposal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>exchange of experiences</td>
<td>4</td>
<td>8</td>
<td>4</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>n = 16</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>( \bar{x} = 2.20 )</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C: Personal assessment. The respondent is helped to remember - or reconsider - the objectives and their attainment. But in having 4 categories prescribed for the answers how explicit is in this case the "mean" and the \( \bar{x} \) for the evaluator? Which consequences do the figures 2.5 versus 2.25 have? Why not decide for a format as in (8)?
2. Objectives

From your perspective: how well has the programme met the objectives of the seminar?

<table>
<thead>
<tr>
<th>Analysis of training needs</th>
<th>very well</th>
<th>well to some extent</th>
<th>hardly not at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information on interesting training approaches</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development of a medium-term training programme</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C: If the evaluator intends to just collect information on evidence, this format would do; if he, however, intends to improve or change something, he must add the question "WHY" = explain, give reason.
IMPLEMENTATION/DESIGN/METHODOLOGY

are areas for evaluation which can hardly be separated. Questions in the evaluation are either geared towards those who have taken responsibilities in the course and everything that has been offered - how - when - why - by whom, or they are pointedly geared towards the individual recipient and how he accepted all this.

From the viewpoint of the evaluator: If I am sure that my course design and presentation is the optimum for the topic I am interested in how it was received by the participant (say, if the course does not adjust to individual knowledge, skill, abilities to learn etc.). If my course design tries to meet individual needs of participants these must compare their fulfillment of expectations with what was offered to them in the course design.

(1) What is your judgement regarding the presentation of the main topics?

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>introduction to workshop documentation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>introduction to Action Training Model</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>from problem complex to an evaluation question</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>writing proposals for evaluation studies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>concept analysis and instruments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>data display and analysis</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>synthesizing data in answering questions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>evaluation tools and instruments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C: The main topics are reiterated. Improvement can only take place when reasons - especially for dissatisfaction - are given. It also shortens the questionnaire if asked for it right here.
DESIGN OF THE COURSE AND COURSE CONTENT:

1. The selection of the topics covered was:
   Excellent, Good, Fair, Poor.

2. The more interesting and useful topics for me were:
   .................................................................
   .................................................................
   .................................................................

3. The least interesting and useful topics for me were:
   .................................................................
   .................................................................
   .................................................................

4. The following topics should have been dealt with in greater depth:
   .................................................................
   .................................................................

5. The following topics should have been left out of the programme:
   .................................................................
   .................................................................

6. In future the following topics should be included in the programme:
   .................................................................
   .................................................................
   .................................................................

C: Those questions give an overall judgement 'for the statistics', the validating individual statements follow in 2-6. They are also recommendations for consideration.
To what extent did the blocks of the programme contribute to increase your knowledge and experience?

17) The participants' experience with SHOs
18) Typical problems of SHOs
19) Need for promotion
20) SH management

C: The lead question and the specific issues 17-20 do not match: Increase of knowledge and experience should be judged upon. The topics suggested then indicate areas for knowledge gain, not for practical experience. And what are respondent and evaluator to understand from those blank brackets?

2.0 Content

2.1 Have you found the content of the programme relevant and interesting?

2.2 Did the simulated exercise, and the subsequent discussion, provide useful experiences? What, if anything, did you gain from these?

2.3 Were the papers presented by the resource persons relevant? What other comments would you make on this aspect of the programme?

2.4 Was the time allowed for discussion after each presentation sufficient to permit your full participation?

2.5 Do you believe the Workshop has succeeded in achieving the aims as represented in the initiation?

2.6 If the Workshop has not, in your opinion, achieved its goals, where do you think it went wrong?

2.7 What has the Workshop achieved in terms of your knowledge and understanding of the central questions which it was addressing?

C: While answers to these questions are certainly of interest to an evaluator the format in which they are presented may cause problems:

1. All questions are open questions, comments are invited but difficult to compare and administer.

2. The questions presume a high competence of the participants, an excellent memory and a full grasp of the whole range of problems and facts discussed 2.1/2.2. Otherwise they would need to be more explicit (2.2/2.3) and reminding (2.5).
4. **Methods used**

4.1. Did we succeed in tailoring the seminar programme according to your professional needs and interests?

- [ ] very much
- [ ] much
- [ ] to some extent
- [ ] hardly
- [ ] not at all

4.2. Were the three seminar stages (needs analysis, information, planning) appropriate to deal with the subject matter?

- [ ] very much
- [ ] much
- [ ] to some extent
- [ ] hardly
- [ ] not at all

4.3. What is your judgment regarding the moderation of plenary sessions?

- [ ] 4: polite
- [ ] 3: clear
- [ ] 2: encouraging participation
- [ ] 1: to the point
- [ ] 0: impolite
- [ ] 3: confusing
- [ ] 2: demotivating/dominating
- [ ] 1: vague/got lost in details

C: Changing the format of questioning avoids monotony and routine in giving 'ticks'.
Instead of asking 'why' one could also ask for suggestions or comments. After all, the evaluator should see past and future!
(6) 1.2 Timetable and duration

<table>
<thead>
<tr>
<th>Time:</th>
<th>not enough</th>
<th>just right</th>
<th>too much</th>
</tr>
</thead>
<tbody>
<tr>
<td>total duration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>time given to phase 1:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>problem identification</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>time given to phase 2:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>information on interesting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>approaches</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>time given to phase 3:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>planning of a medium</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>term programme outline</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>time given to recreation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(7) 1.5 Time distribution

<table>
<thead>
<tr>
<th>Time for:</th>
<th>not enough</th>
<th>just right</th>
<th>too much</th>
</tr>
</thead>
<tbody>
<tr>
<td>information inputs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>and plenary discussions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>time for group work</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>time for individual work</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>time for recreation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Any comments regarding organisation................................................
........................................................................
........................................................................
........................................................................

C: Time given to topics is worth a judgement. The methods used and the time allotted to different work styles should also be evaluated. They could give clues to individual preferences for styles of learning but indicate further trends, s.a. preference for group work, handouts rather than OHP etc.
1. Organization

1.1 What is your opinion on the overall organization and on resources available to the seminar?  

<table>
<thead>
<tr>
<th></th>
<th>excellent</th>
<th>good</th>
<th>fair</th>
<th>poor</th>
<th>very poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>board and lodging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>conference room</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>instructional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>facilities,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>audiovisual aids</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>steering committee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>functioning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>secretarial</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>assistance (e.g.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>typing, duplicating)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>display of materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>overall organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>and administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Methods

2.1 Was the participative planning of the workshop based on the needs and expectations expressed by participants on the first plenary session (Monday, 4th June)?

- to a great extent
- somewhat
- hardly
- not at all

2.2 Was participative planning of the workshop by the Steering Committee successful in designing a workshop programme relevant to your own needs?

- completely
- to a great extent
- somewhat
- hardly
- not at all

2.3 Was there a proper mix between information inputs (lectures), plenary discussions, group work, individual work?

- very much
- to a great extent
- to some extent
- hardly
- not at all

2.4 Did information inputs and plenary discussions stimulate active participation of all participants?

- very much
- to a great extent
- to some extent
- hardly
- not at all

2.5 Did group work stimulate active exchange among group members?

- very much
- to a great extent
- to some extent
- hardly
- not at all

C: Questions under one theme, here "organization" (8) "methods" (9) with subtopics could be grouped in one block which is clear, easy to administer, easy to understand and economical. If one wants to be sure that the participant reads every question carefully and does not give routine answers splitting may help. (Confusing for the evaluator, though, when going over many returns!)
PRESENTATION/LANGUAGE/TEACHING AIDS

There is no clear distinction between some aspects discussed under design and those to be dealt with now. This is mainly to draw attention to some relevant questions in cases one is dealing with a rather heterogeneous group of different background with different learning experiences; when dealing with a multilingual group or when either speakers' and/or participants' first language is not the conference language. Further, when specific teaching aids play an important role in the teaching methodology which will lastly determine the attainment of objectives and learnings.

(1) 7. My understanding of the topics discussed was:

   Excellent  Good  Fair  Poor

8. This was because the material used was:

   Interesting,  Uninteresting  Relevant  Irrelevant

9. and/or because the lecturer's ability to communicate was:

   Excellent,  Good,  Satisfactory,  Fair,  Poor

10. and/or because, group participation in the discussions was:

    Excellent  Good  Satisfactory  Fair  Poor.

B. PRESENTATION

1. The manner of presentation by the Resource Personnel was generally:

   Excellent,  Good,  Satisfactory,  Fair,  Poor.

2. The methods used in the presentation were:

   Excellent,  Good,  Satisfactory,  Fair,  Poor.

3. The handouts, films, case studies, exercises, etc. were:

   Relevant,  Irrelevant,  Interesting,  Uninteresting.

C. This is too general a judgement. Does the evaluator only want "a general feeling"? These questions do not do justice to some outstanding i.e. above or below "average" factors.
(2) What is your judgement regarding the presentation and elaboration of training needs?

<table>
<thead>
<tr>
<th>presentation by participants</th>
<th>excellent</th>
<th>good</th>
<th>fair</th>
<th>poor</th>
<th>very poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>discussion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>summing up of plenary discussions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C: Even though rough this represents a better distinction of methods within one theme (presentation, discussion, summing up).

(3) What is your judgement regarding the visualization of information?

<table>
<thead>
<tr>
<th>just right and helpful to follow</th>
<th>not enough</th>
<th>a bit too much</th>
<th>superfluous</th>
</tr>
</thead>
</table>

Did methods used encourage active participation?

<table>
<thead>
<tr>
<th>very much</th>
<th>much</th>
<th>to some extent</th>
<th>hardly</th>
<th>not at all</th>
</tr>
</thead>
</table>

C: Apparently one specific method is of interest, and the felt result of the use of different methods, i.e. "encourage active participation".

(4) Was the quality of

<table>
<thead>
<tr>
<th>handouts</th>
<th>discussions</th>
<th>group work</th>
<th>field visits</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>good</th>
<th>just right</th>
<th>below level</th>
</tr>
</thead>
</table>

C: What is the yardstick for "below level"?
36) Concerning the number and duration of the presence of the resource persons:
- It is preferable to have many resource persons for a shorter period. □
- It is preferable to have few resource persons for a longer period. □
- This workshop's setting was optimal. □

Remarks:

C: 'Multiple choice', but is very suggesting without really explaining the reason for the preference.

(6) Did you have difficulties in understanding subject matter

<table>
<thead>
<tr>
<th></th>
<th>had no difficulties</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>had some difficulties but understood the essentials</td>
</tr>
<tr>
<td></td>
<td>did not understand quite a lot</td>
</tr>
<tr>
<td></td>
<td>had great difficulties to follow</td>
</tr>
</tbody>
</table>

If yes: Please indicate parts/topics?

C: This is difficult for the respondent to understand (and so it is for the evaluator!). The one blank box could stand for "yes" and "no" if we are guided by the last statement: if yes ... As the respondent is only expected to tick against the statement he feels is appropriate for him it should just read: if you ticked here please explain. Otherwise he is tempted to ask himself: "did I not understand a lot" yes or no, and may end up in a double negation which should be treated like 'yes'! So, what did he understand!?!
Language (for a training course in a foreign language X)

1.) How well do you judge your ability to communicate in X?
very good  good  fair  not so good  not at all

2.) How about your knowledge of technical language in X?
very good  good  fair  not so good  not at all

C: Answers to these questions will most likely not be very helpful as they consist of a pure self assessment. People who can communicate truly well will not tick "very good" out of modesty. Others will rather try to upgrade themselves and nobody will admit that he/she can not communicate at all. Therefore these questions do not provide information about the language level to be expected for which any comparable measure is missing.

Instead it could be useful to verify the personal assessment of a participant in a formative or summative evaluation:

(8)

1.) Did you have difficulties in understanding the speakers in terms of:

<table>
<thead>
<tr>
<th></th>
<th>no</th>
<th>at times</th>
<th>yes</th>
<th>if yes</th>
<th>Comments/Reactions/Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>language</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(technical terms/</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>choice of words)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>expressing ideas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2.) How long did it take you to adjust yourself sufficiently to understand the lectures in X (foreign language)?

C: Answers to these questions may help in adjusting the speed of sequencing topics, providing information and expecting responses.
SECTION (C) - MODULE EVALUATION

MODULE TITLE - ____________________________________________
INSTRUCTOR(s) - __________________________________________

1. Various aspects of the module are covered in the chart below. Please fill in by putting a tick for each aspect or question, under the heading that most resembles your own reaction. You can then add any further explanatory comments you feel necessary in the column on the right of the chart.

<table>
<thead>
<tr>
<th>Question/aspect of module</th>
<th>very poor</th>
<th>poor</th>
<th>average</th>
<th>good</th>
<th>very good</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Your general opinions on the module</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Were you happy about the course content?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Could the various subjects in the module have been taught in a better way?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 How do you feel about the intellectual level of the module?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Will the subjects taught in the module be useful for your work?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 How did you react to any visual aids used?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Were the visual aids well prepared?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Was the grading of your work properly handled?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Did you enjoy the module?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Did the module contain too much information?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Were the lectures well organized?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Were the lectures well prepared?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C: This one page questionnaire seems to capture effectively and in brief many relevant aspects. The problem lies in the mismatch of questions and suggested answers ranging from 'very poor' to 'very good' which in most cases is inappropriate, even leading to misunderstandings; prominent examples are: questions 3/5/10.
Alternatives: Change criteria (good-poor), ask for the purpose at times, add a scale. 'Comments' are useful.
Methodologically one could also ask a teacher for assessment in regard to a specific methodology. One example is given below:

(10)

1. How do you assess the educational impact of these experiments?
   - enrichment (high) 🔴
   - enrichment (low) 🔴
   - the same lesson situation as before 🔴
   - disadvantages caused by changed methodology and teaching style 🔴

2. How do you assess the time needed for setting up the experiments?
   - too long 🔴
   - acceptable 🔴
   - useful for the learning process 🔴

3. Do you think the teacher will conduct the experiment in full view of the pupils. Why or why not?

4. How do you assess the interest of the pupils?
   - in setting up the experiments
     - considerable 🔴 normal 🔴 low 🔴
   - in conducting the experiments
     - considerable 🔴 normal 🔴 low 🔴

5. Do you think the average teacher (without specific training and only equipped with an instruction manual) will have difficulties in setting up and conducting the experiments?
   - considerable 🔴 few 🔴 no 🔴
   - Which difficulties might be involved?

6. How do you assess the ability of the average teacher to conduct these experiments?

<table>
<thead>
<tr>
<th>professional or technical</th>
<th>good</th>
<th>average</th>
<th>poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>methodical</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
7. How do you assess the motivation of the average teacher to use these materials for an experimental approach (assuming that teaching aids, equipment, raw materials and tools needed are available)

<table>
<thead>
<tr>
<th></th>
<th>above 50%</th>
<th>above 50%</th>
<th>below 50%</th>
</tr>
</thead>
<tbody>
<tr>
<td>untrained teachers without specific training on this approach</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>untrained teachers with specific training ...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>trained teachers without specific training ...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>trained teachers with specific training</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. How do you estimate the extent, style and method of the information needed for the teacher?

- brief/key words
- extensive texts

9. To what extent do you consider that additional information is necessary (assuming that schoolbooks are not available)?
Some attention must be paid to what is called FACILITIES. Why ask? Of course to give opportunity to participants to give their feelings about anything that contributes to their well-being. The evaluator should, however, know that he just creates unnecessary needs and desires when asking for things he knows he can not change. If there is, for example, a training centre in which all training must be held it is unnecessary to ask "how do you find the location of the centre?" Some will say "very nice and quiet" and others will complain "too far from the city". So, what - unless there are serious plans to move to another location! If, however, special arrangements had to be made or paid for it is worth an evaluation as to the proper functioning or worthiness.

Here follow examples:

(1) FACILITIES:

I rank the following facilities at the Institute as follows:

1. Accommodation: Excellent, Good, Satisfactory, Fair, Poor
2. Food (quality): Excellent, Good, Satisfactory, Fair, Poor
   (quantity): Excellent, Good, Satisfactory, Fair, Poor
   (service): Excellent, Good, Satisfactory, Fair, Poor
3. Tea/Coffee Service: Excellent, Good, Satisfactory, Fair, Poor
4. Telephone/Mail Service: Excellent, Good, Satisfactory, Fair, Poor
5. Transport Arrangements: Excellent, Good, Satisfactory, Fair, Poor
6. Library: Excellent, Good, Satisfactory, Fair, Poor
7. Laundry Services: Excellent, Good, Satisfactory, Fair, Poor
8. Recreational Facilities: Excellent, Good, Satisfactory, Fair, Poor
9. Other (Specify): Excellent, Good, Satisfactory, Fair, Poor

C: (1) Since the marking criteria are the same throughout they could have been presented in one box as below;

(2) makes it easier for the administrator!

(2) To what extent were you satisfied with

a) Communication about the workshop
b) travel arrangements
c) accommodation
d) food
e) secretarial facilities
f) time schedule
(3)

Please, give your judgment on the scheduling of the Conference with emphasis on the components listed hereunder (tick off as appropriate):

Kindly add your comment or reason for your eventual negative judgement(s)

<table>
<thead>
<tr>
<th>Components</th>
<th>1. Judgement</th>
<th>2. Comment / Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date (Month/Season)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Duration (no. of days)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Starting Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finishing Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working Hours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breaks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Location of Conference Venue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please, specify:)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C: From the details given in this questionnaire an external evaluator could conclude that the factors mentioned played an important role in the preparation for the meeting. The answers should therefore be geared towards helping the planning in the future.
C: Some of the criticisms could apparently be considered and changed or influenced in the future.

The manner in which the questions are presented seem to indicate the displeasure already to which others can agree. The evaluator must be aware that this manner of putting questions is very suggestive.
(5) **Organization**

What is your opinion on the overall organizational background of the workshop.

<table>
<thead>
<tr>
<th></th>
<th>excellent</th>
<th>good</th>
<th>fair</th>
<th>poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>facilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>board and lodging</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>secretariat</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>steering committee</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>faculty/ tutors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>process observation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C: While the pattern of this scheme is very clear one wonders whether all participants know what is meant by "facilities" when "secretariat" is excluded; by the way, does it refer to the office in charge of administration/organization or the office of the typists? What is "process observation" having in mind that the "organizational background" (see headline) is surveyed. Remember: Questions must be simple and clear!

(6) **Organization**

How did you assess the organization and the "off-work" programme of the Conference?

( ) ( ) ( ) ( ) ( )

Did you consider the Centre appropriate?

( ) ( ) ( ) ( ) ( )

How did you assess lodging at the Centre?

( ) ( ) ( ) ( ) ( )

How did you assess boarding at the Centre?

( ) ( ) ( ) ( ) ( )

C: If I were the respondent I would just not know where to tick and for which purpose - and if I were the evaluator I might be worrying what the respondent is trying to express - if he ticked at all.
ASSESSMENT OF LEARNINGS and RECOMMENDATIONS are areas which have been touched upon earlier already (s.a. attainment of objectives and comments asked for at several occasions). We mention those again because they make very useful reference for later evaluation as to the impact of training on attitude or performance of an individual ('I was more aware of the problems I would have to deal with'; 'I knew how to do certain things'), the change of a situation (could a problem be solved due to capability of trained staff); the efficiency of an institution (does it have the reputation of professional competence). In the process or at the end of training we can only ask the individual about what he/she thinks has been learned, could be useful, could be applied. This need not be true! A test, for example, could prove otherwise. Yet, these questions should be asked. They can also show where a training could draw special attention and left some impression.

If the answers should really be meaningful one must avoid general questions "Do you think the seminar was useful?"

1. Do you think you gained or improved writing skills during this workshop?

- very much so
- much
- uncertain
- hardly
- not at all

2. If you have already been writing has this workshop given you any new knowledge and insights?

- very much so
- much
- uncertain
- hardly any
- not at all

C: A very clear self-assessment in question 1; question 2 leaves too much unanswered. If it was the intention to provide new knowledge and insight the evaluator should be interested in details: which ones were received as such. If there was no such specific intention, why ask the question?
(2) USEFULNESS OF COURSE

1. Was the course useful to you as an individual and if so, what did you benefit from it?

.................................................................
.................................................................
.................................................................

2. If it was useful, how do you hope to apply what you have learned to your Organization?

.................................................................
.................................................................
.................................................................

3. Having experienced the course, would you say it was:
   Too long,       Too short,       Just right.

4. Would you recommend it to others?

.................................................................

C: The respondent must be specific about what he thinks was 'useful' and 'applicable'. If the organizer had a clear perception as to what should be learnt and applied he may decide to suggest certain areas for choice. This makes the evaluation of the answers easier and comparable (allow several ticks and add one line for "others"!) relative to answers to 'open' questions.

(3) Was there anything new for you which you consider a learning? What was it?

What specific learnings are you going to apply in your daily work?

Even if you cannot apply those learnings immediately, what were some of your learnings?

C: Compared to the previous example this first (open) question is searching for incidental or even unintended learnings and is inquiring about a very distinct judgement regarding learning and applicability.
1. Is the subject matter of the workshop (e.g., integrating educational supports in RRD)
   a) relevant to the situation in your home country
      relevant ( ) ( ) ( ) ( ) ( ) not relevant
   b) in line with the policy in your home country
      relevant ( ) ( ) ( ) ( ) ( ) not relevant
   c) related to your task at home
      related ( ) ( ) ( ) ( ) ( ) not related

REMARKS .................................................................

C: The questions specify what is sometimes phrased in - useless! - questions as being generally "relevant", "related", "applicable".

2. To what extent did the workshop provide you with better/new understanding on the subject matter
   high extent ( ) ( ) ( ) ( ) ( ) low extent

3. To what extent will the acquired understanding form the basis for further action
   high extent ( ) ( ) ( ) ( ) ( ) low extent

REMARKS .................................................................

C: Though the questions could produce a meaningful answer this is a good example of dangerous monotony in applying one scheme for the answers: Either question implies that there was meant to be a lot of "new" understanding which hopefully will influence future action. So, "if there was" the evaluator would very much like to know which ones and in which areas (to be able to judge the impact) and "if there was not" what went wrong that needs cure.
(6) If this course were repeated, and a colleague asked your advice about whether it was worth attending, what would you say?


yes, go
no, don't go
yes, go as long as the organizers improve on the following main areas (Please explain briefly below)

Looking back on it, does anything about this course stand out as being particularly helpful to you in relation to your work?


yes
no

C: If this was meant to be an elegant way of finding out the acceptance and quality of the course, the question is misleading: Will anybody really answer "don't go" because of the quality of the course—more so if it were paid for? But if it is "go" it may not only be because of the quality. Attending any training in many countries still adds to the credits for promotion or salary increase which may be an important incentive, too! The second question will reveal a more honest answer.

(7) 3 Do you feel more confident now as a writer?


very much so  much more uncertain hardly not at all

4 Do you anticipate to do further expository or creative writing after this workshop?


very much so  quite a bit uncertain hardly any not at all

5 Do you think that the writing skills acquired during this workshop will assist you in your other daily work involving writing?


very much so  much uncertain hardly not at all

6 Do you think the workshop was worth your time?


very much so  much uncertain hardly not at all

C: The following two sets of questions are mainly directed towards implications of the training which can only be seen later. If it was the intention of the training to make such a long range impact it is proper to ask for the views/assumptions of the participants now—but to round the picture it needs another evaluation after some time for verification, taking as criteria objectives of those courses.
The objectives of the workshop were

a) to become acquainted with modern documentation techniques and basic management concepts thereof
b) to create an awareness of the importance of co-ordinated national information services and international co-operation
c) to prepare for an eventual creation of national documentation centres in the sub-region

To what extent were these objectives achieved?

(Tick appropriate)

a) [ ] [ ] [ ] [ ]
b) [ ] [ ] [ ] [ ]
c) [ ] [ ] [ ] [ ]

To improve presentation and delivery in the future I suggest the following:

About Lecturers........................................

About Methods........................................

About handouts, films and slides exercises........

Other: ..................................................

What specific improvements, professional or administrative, would you suggest for future Workshops?

(a) ..................................................

(b) ..................................................

(c) ..................................................

(d) ..................................................

C: Inviting recommendations could be in an open question "general" or to any specific question; it can also prescribe certain categories in which the evaluator is particularly interested in. So he will get recommendations in regard to: 1./2./3. which can more easily be handled.
LATE FOLLOW-UP

When one wants to find out whether objectives of a training were met in the sense that they truly made an impact, one has to go beyond self-assessment made in the enthusiasm of a just concluded training. Some tangible results could be seen in actual tests. Do people really know what they think they know? More interesting even a late follow-up after some time has passed - despite some of the serious bottlenecks which have been mentioned earlier. Did people do what they promised to do or at least tried to? "After I came back I set up a new ...", "After I came back I reorganized ...". It does not say, yet, whether this means a real improvement, but it is a change initiated by some effect of training.

Following are examples of questionnaires interested in activities which were triggered off by training courses (1), a late assessment of "what happened after you came back" (2), an assessment of the effect of training as judged upon by a superior (3).
(1) Could you initiate new action for and stimulate or deepen contacts due to the fact that you participated in the seminar?

Within your own country / institution

- Whom did you inform on proceedings and discussions of the seminar?

  ☐ political decision makers
  ☐ colleagues
  ☐ staff
  ☐ others
  please specify:

- Besides information, which additional action did you initiate in your country due to insights or contacts gained during the seminar?

  Please specify:

- So far which have been the main results of information and further action taken?

  Please specify:

Cooperation with international, intergovernmental and non-governmental organisations represented at the seminar

Did your contacts continue after the seminar?

  ☐ no
  ☐ yes

  if yes, with whom:
VI. INTERVIEW GUIDELINES FOR THE EVALUATION

1) What is your present position?

.................................................................

Position before the course?
.................................................................

Promotion since graduation?
What kind? Higher position □
Salary increase □

In which institution did you work when you were nominated for the scholarship?
.................................................................

.................................................................

2) Do you think that participation in the training course in has been important with a view to your professional promotion?
important □
of some importance □
not important □
o Could you use the content of the course in your work?
   yes [ ]
   to some extent [ ]
   no [ ]

o Could you use the skills acquired during the course in your work?
   yes [ ]
   to some extent [ ]
   no [ ]

o Which subjects or courses have been of particular relevance to your work during the past years?
   state: ........................................................
   ........................................................

3) o Activities / projects / research programmes / publications since return from...
   Activities: ........................................................
   ........................................................
   ........................................................
   Projects: ........................................................
   ........................................................
   ........................................................
   Research Programmes: ........................................
   ........................................................
   Publications: ..................................................
Multiplier effects:
- run training courses for curriculum experts at national level
- lectures at Teacher Training Colleges / Univ.
- lectures to colleagues at Curriculum Centres
- research and studies
- others

Present activities (work in progress)

4) Did you face any problems / difficulties?
   - before the course (selection procedure)
   - after return to home country?

5) Recommendations for future courses?
o Subjects to be discarded

-----------------------------------------------
-----------------------------------------------
-----------------------------------------------

o Subjects included

-----------------------------------------------
-----------------------------------------------
-----------------------------------------------

6) General comments concerning your stay in.....

-----------------------------------------------
-----------------------------------------------
-----------------------------------------------
7a. Indicate the extent to which you consider that there is a difference in the work performance of your staff before and after training.

<table>
<thead>
<tr>
<th>Institution where training obtained</th>
<th>Extent of difference in work performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very Significant</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7b. If your expectations have not been met what are the reasons?

a) ____________________________________________

b) ____________________________________________

c) ____________________________________________

8. Impact of the training programmes

If you had staff members trained at: ___________
how did the work of your Institution in the field of ___________ change, when this/ person(s) resumed work. Please give details.

__________________________________________

__________________________________________

__________________________________________
12. Costs and Cost Efficiency

Indicate what it costs your Institution when one member of staff is selected for a long-term training programme in:

- Salaries/Allowances
- Salaries/Allowances for a replacement
- Travel expenses
- Logistic (research, fuel and equipment)
- Other expenses or costs

13. When a member of staff attended a long-term course, how did this affect the work of the institution.

(a) Delays in production (please specify)
(b) Professional skills and knowledge shortfalls in programme volume (please specify)
(c) Any others

14. Indicate whether the Institution upon the return of a member of staff from a long-term training programme, incurs additional costs in

- Salaries and allowances due to promotion
- Equipment and facilities requested by the trainee
- New procedures being proposed by the trainee

Explain here if necessary:
13. Explain what benefits your institution derives when a member of staff returns from a long-term programme of training with regard to the following

(a) Increased efficiency in the use of time (e.g. materials produced in less time than before).
(b) Increased capacity of production
(c) Increased quality of production and work
(d) Savings in the costs of production

please give examples

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________