Module 3 Backgrounder Template

1. Context
2. My submission addresses (✓ one):

🞏 A real situation 🞏 A fictional situation

1. The evaluation will be carried out for an organization involved in the “business” of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
2. My client is (position title): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
3. My key contact person within the organization, if other than the client, is (position title):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

1. My role as the evaluator is (✓ one):

* Internal (on-staff) consultant
* External (for-hire) consultant

1. I am the facilitator (trainer) cited in the strategy:

🞎 Yes 🞎 No (If “no”, specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

2. Description of the situation

1. The client describes the situation as (✓ one):

🞏 An opportunity 🞏 A problem

1. What is the opportunity or problem that is being addressed by the training program? SPECIFICALLY, what are the impact, transfer, and learning issues?

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| **Impact:**  *(State here the desired “big picture” results – related to the target learners’ transfers.)*  **Transfer:**  *(State here the desired transfers – real-world applications of the learned KSAs – required of the target learners.)*  **Learning:**  *(State here the desired KSAs – see the performance statements in learning objectives – required of the target learners.)* |

1. The target learners are (specify the occupational group, the number therein, and the maximum number of learners at any given training session):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

(Note: in the strategy, refer to the target learners as “target learners” or “learners” rather than to their occupational group or groups.)

d) The assignment requires any two evaluation instruments. For each, cite the instrument and its method # and level:

* \_\_\_\_\_\_\_\_\_\_\_\_ level method # .
* \_\_\_\_\_\_\_\_\_\_\_\_ level method # .

Evaluation Strategy Template

## *People Development, Halifax (edited, W. Goggin, September 2000)*

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| --- | --- | --- | --- | --- | --- | --- |
| L | Data | Sources | | Methods | | Timing |
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## *People Development, Halifax (edited, W. Goggin, September 2000)*

Evaluation Strategy Template

## *People Development, Halifax (edited, W. Goggin, September 2000)*

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| L | Data | Sources | | Methods | | Timing |
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Interview Schedule (Generic)

Interviewee Organization Date & Time

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| QUESTION # : |
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Anticipated Responses:

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Comments: Degree of Emphasis scale \* Low 1 2 3 4 5 6 7 High Mood ↓

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*Source: M. Adkins, Diploma in Adult Education, ‘97. Adapted by StFX..*

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| **The (observed occupation)** | | | | | | | | | |
| *For each item, check one of “yes” or “no” or “not observed”. Then for “yes” items only, circle one number.* | | **Yes** | **No** | **N/Obs** | **(Insert anchor)** |  |  |  | **(Insert anchor)** | |
| 1 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 2 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 3 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 4 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 5 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 6 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 7 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 8 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 9 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 10 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 11 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 12 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 13 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 14 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |
| 15 |  |  |  |  | 1 | 2 | 3 | 4 | 5 | |