

# **A Formative Evaluation of the Student Advisor Training (SAT) Program**

Evaluators: Thomas Frazier, Kandi Horsman, and Stephania Moore  
OPWL 530 Evaluation  
Boise State University  
Fall, 2019

## Note:

- Identifiable information (such as the organization's and stakeholders' names) has been removed or replaced with pseudonyms.
- You may use this project sample for your learning purposes only. You may not copy, cite, reproduce, or distribute any content without written permission of the authors.

# Table of Contents

Executive Summary.....	1
1. TRIPLE ALPHA Center .....	4
2. SAT Program and Stakeholders.....	5
2.1. Instructor-Led SAT Program.....	5
2.2. Stakeholders .....	8
3. Evaluation Methodology.....	9
3.1. Evaluation Purpose and Type.....	9
3.2. Dimensions, Evaluation Questions, and Importance Weighting .....	9
3.3. Data Collection Procedure and Methods.....	9
4. Evaluation Results .....	11
4.1. Training Graduates’ Performance.....	11
4.2. Course Design .....	12
4.3. Post-Training Support .....	13
5. Conclusions .....	15
5.1. Overall Quality .....	15
5.2. Recommendations .....	15
6. Meta-Evaluations and Limitations .....	24
7. Reporting.....	25
References .....	26
Appendix A: Feasibility and Risk Factors.....	28
Appendix B: Instruments and Rubrics.....	34
Appendix C: Training Graduate Survey Instrument .....	40
Appendix D: Peer Training Instructor Survey Instrument.....	51
Appendix E: Training Graduate Supervisor Survey .....	53
Appendix F: Success Case Method Interview Protocol.....	57
Appendix G: Extant Data Review Checklists .....	62
Appendix H: Data Collection Results for Dimension 1: Training Graduates’ Performance .....	65
Appendix I: Data Collection Results for Dimension 2: Course Design .....	71
Appendix J: Data Collection Results for Dimension 3: Post-Training Support.....	74
Appendix K: Qualitative Codebook .....	78

## EXECUTIVE SUMMARY

### Background

TRIPLE ALPHA Center (or ALPHA in short) provides training to various public service personnel who are mostly young adults. Apprentice training, hereafter known as AppTrain, comprises about 1/3 of ALPHA's annual student body. In 2005, ALPHA's leaders noted a series of behavioral and performance issues among AppTrain students and determined that an intervention was required.

The Student Advisor Training (SAT) was designed and implemented in 2006. Its purpose is to prepare those serving in an advisor and instructor dual role for AppTrain students, with the knowledge, skills, and attitudes needed to help reduce the behavioral and performance issues among AppTrain students. Informal feedback received from SAT participants had been generally positive, but a Level 3 evaluation had not yet been conducted to assess graduate performance on-the-job. Mr. Clay Donnelly, the Student Performance Department's Training Consultant, agreed to partner with the evaluation team as client, to conduct this program evaluation.

### Evaluation Methodology

Through discussions with the client and key stakeholders, the evaluation team determined that findings would be used to improve program content and extend support in the post-training work environment. For these reasons, it was determined that a formative, goal-based evaluation would be conducted to investigate how well the program is designed and supported to help new student advisors develop the requisite knowledge, skills, and attitudes to assist students with removing barriers to the successful completion of their training program.

The evaluation team also incorporated a goal-free evaluation approach to find out if there are any unintended positive or negative side effects resulting from the program. The team and client agreed to focus on the following three dimensions with relative degrees of importance weighting:

1. **Training Graduates' Performance** (Critical): How well do the SAT graduates transfer their new learning to their role as student advisor?
2. **Course Design** (Very Important): How well does the SAT program employ appropriate instructional and motivational strategies to support trainee learning, confidence, and transfer?
3. **Post-Training Support** (Very Important): How well are the SAT graduates supported by environmental factors in their role as student advisor after returning to the workplace?

The evaluation team developed a mixed-methods data collection plan with a variety of sources. They applied evidence-based design methods and techniques to instrumentation to ensure results could be triangulated. The team's data collection plan included the following methods and sources as seen in Table 1.

Table 1. Mixed-Methods Data Collection Plan

Dimension	Method	Source
1. Training Graduates' Performance	Extant data review	Level 1 surveys with AppTrain students
	Anonymous web-based survey	Supervisors
	Identifiable web-based survey	SAT Graduates
	Success Case Method (SCM) interviews	SAT Graduates
2. Course Design	Anonymous web-based survey	SAT Instructors
	Identifiable web-based survey	SAT Graduates
	Extant data review	Classroom observation with SAT students and instructors
		Class materials with client
3. Post-Training Support	Anonymous web-based survey	Supervisors
	Identifiable web-based survey	SAT Graduates
	SCM interviews	SAT Graduates
	Extant data review	Schoolhouse support programs and documents with schoolhouses

## Evaluation Results

As seen in Table 2, all three dimensions of the SAT program received a rating of *Needs Improvement*. This designation was based on triangulation rubrics developed to determine the overall quality of each dimension, based on the team's analytics.

Table 2. SAT Evaluation Results

Dimension	Student Advisor Training (SAT) Program				Weighting
	Not Acceptable	Needs Improvement	Acceptable	Superior	
1. Training Graduates' Performance		X			Critical
2. Course Design		X			Very Important
3. Post-Training Support		X			Very Important
	<b>Not Acceptable</b>	<b>Needs Improvement</b>	<b>Acceptable</b>	<b>Superior</b>	

## Conclusions

The evaluation project identified programmatic strengths that could be better leveraged to improve SAT's efficacy. Recommendations for data-driven modifications to existing organizational resources were aligned with the evaluation findings. The recommendations focus on improving mentoring and communication between student advisors and students, increasing the value of SAT's curriculum and schedule, and reducing negative impacts of variation between the schoolhouses. Recommendations with greater specificity are included later in this report (see [Recommendations](#)).

## Limitations and Reporting

The evaluation team worked in tandem with the client to develop a project plan that anticipated and mitigated risks contained in [Appendix A: Feasibility and Risk Factors](#). Despite this careful planning, the project met with external forces that challenged the data collection plan. Threat of wildfire likely resulted in a poor survey response, leaving the client and team to consider the merits of survey deployment timing, extension of the survey period, and survey validity. While the evaluation team can be sure there was some degree of limitation to survey responses, the team cannot know to what extent the circumstances of the wildfire affected response by schoolhouse. The generalizability of the evaluation team's learning will likely be limited as the participation across the schoolhouses lacked robust representation.

Evaluation team member Thomas Frazier will schedule a meeting with the client, Mr. Clay Donnelly to review the evaluation, findings, and recommendations to improve the SAT program.

## 1. TRIPLE ALPHA CENTER

TRIPLE ALPHA Center (or ALPHA in short) provides training to various public service personnel who are mostly young adults. Apprentice training, hereafter known as AppTrain, comprises about ⅓ of ALPHA's annual student body. In 2005, ALPHA's leaders noted a series of behavioral and performance issues among AppTrain students and determined that an intervention was required.

The Student Performance Department (SPD) developed two new interventions—Student Orientation program for AppTrain students and Student Advisor Training (SAT) program for AppTrain student advisors/instructors. The SAT program is the one that was evaluated in this evaluation project.

The SPD Training Consultant, Mr. Clay Donnelly, developed the SAT program using data collected from a focus group of experienced student advisors. The data helped the SPD to identify desired competencies of student advisors and design a training program to equip new instructors reporting to the role with the knowledge, skills, and attitudes needed to exceed performance expectations.

The SAT program launched in 2006 and prepares approximately 50 new instructors to serve as AppTrain advisors each year. Informal feedback received from participants has been generally positive, but no Level 3 evaluation has been conducted to assess graduate performance on-the-job. In August 2019, Mr. Donnelly requested that the evaluation team conduct a formal evaluation of the SAT program. He served as the client for this evaluation.

## 2. SAT PROGRAM AND STAKEHOLDERS

### 2.1. Instructor-Led SAT Program

SAT is a one-day (8 hours with 1 hour lunch break) instructor-led training program which focuses on helping the SAT advisors properly complete student advisor administrative tasks and effectively lead and influence AppTrain students. The program is primarily lecture-style with a few interactive group activities. The program's agenda is outlined in Table 3.

**Table 3. SAT Program Agenda**

<b>Time</b>	<b>Activity</b>
Morning (3.5 hours)	Instructor-led, in classroom
Break (1 hours)	Lunch
Afternoon (3.5 hours)	Instructor-led, in classroom

Although the main goal of SAT is to help participants increase their knowledge, skills, and attitudes regarding effective leadership skills, another intended outcome is participants' development of a network for sharing information such as lessons learned and providing support for managing challenges and conflicts that may arise in the workplace.

In collaboration with the client, the evaluation team developed a training impact model for the SAT program. Table 4 is the training impact model (TIM), outlining the means and end results of the program.

- **Resources:** Facilities, tools, materials, data, personnel, etc. that the program will use
- **Activities:** Process that the program will execute
- **Program Capabilities:** Knowledge, skills, and attitudes that participants will acquire
- **Critical Actions:** Job-specific behaviors that participants will exhibit
- **Key Results:** Job-specific outcomes that participants will leave behind as a result of their job behaviors
- **Business Goals:** Organizational outcomes to which the program will contribute

Table 4. SAT Program's Training Impact Model

Resources	Activities	Program Capabilities	Critical Actions	Key Results	Business Goals
What resources should be used to run the training program?	What activities should be used to run the training program?	What capabilities (i.e., knowledge, skills, and attitudes) should the trainees acquire?	What behaviors should the trainees demonstrate on the job as a result of training?	What job results should the trainees leave behind?	To what organizational goals would the training program contribute?
<ul style="list-style-type: none"> <li>• Training Director</li> <li>• Human Resources Manager</li> <li>• Training Consultant</li> <li>• Peer instructors</li> <li>• Evaluations Director</li> <li>• Classroom</li> <li>• Instructor guides</li> </ul>	<ul style="list-style-type: none"> <li>• Design and develop training materials</li> <li>• Revise training materials based on Senior Stakeholder Board input</li> <li>• Post SAG on portal</li> <li>• Manage rosters and schedules</li> <li>• Schedule training sessions</li> <li>• Print course materials,</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of <ul style="list-style-type: none"> <li>○ performance expectations regarding attitude, appearance, and conduct</li> <li>○ ALPHA appropriate/inappropriate interpersonal relationships policies</li> <li>○ models for effectively motivating and communicating with students</li> <li>○ strategies for class cohesion, team dynamics, and mutual support</li> <li>○ student advisor's role in student support</li> <li>○ strategies for identifying, selecting, and influencing a class leader</li> <li>○ strategies to help foster good decision-making skills</li> <li>○ drug and alcohol policies</li> <li>○ common student personal issues</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrate attitude, appearance, and conduct in adherence to performance expectations</li> <li>• Demonstrate appropriate interpersonal relationships in adherence to ALPHA policies</li> <li>• Select the appropriate forms for various needs and requests</li> <li>• Complete all fields on forms with the correct information</li> <li>• Complete administrative tasks accurately, following the processes and procedures documented in the SAG and specific Standard Operating Procedures (SOP)</li> </ul>	<ul style="list-style-type: none"> <li>• AppTrain students who performed according to performance expectations</li> <li>• Cohesive AppTrain student teams formed and maintained</li> <li>• AppTrain student needs and requests met in a timely manner</li> <li>• Administrative processes completed without error</li> </ul>	<ul style="list-style-type: none"> <li>• High-performing student graduation rates increased</li> <li>• Low-performing student graduation rates decreased</li> <li>• Student discipline issues decreased</li> </ul>

Resources	Activities	Program Capabilities	Critical Actions	Key Results	Business Goals
<ul style="list-style-type: none"> <li>• Student advisor Guide (SAG)</li> <li>• Consumables</li> <li>• Shoulder cords</li> <li>• Training portal</li> <li>• Policies &amp; procedures</li> <li>• Online survey tool</li> <li>• Slideshow</li> <li>• Presentation system</li> <li>• Hard copies of slideshow slides</li> </ul>	<p>certificates, and completion memos</p> <ul style="list-style-type: none"> <li>• Reserve, set up, and tear down classroom</li> <li>• Conduct Level 1 survey to gauge AppTrain student reactions to SAT-trained student advisors</li> </ul>	<ul style="list-style-type: none"> <li>○ local area, culture, and hazards</li> <li>○ warning signs for students at risk of stress and depression</li> <li>○ student support resources</li> <li>○ Special Needs programs</li> <li>○ conflict mediation</li> <li>○ room transfer policies</li> <li>○ fault/ no fault disenrollment and the consequences to student</li> <li>• Ability to <ul style="list-style-type: none"> <li>○ select the appropriate forms for various needs and requests</li> <li>○ accurately complete all fields on forms</li> <li>○ accurately carry out processes and procedures for administrative tasks</li> </ul> </li> <li>• Confidence in <ul style="list-style-type: none"> <li>○ mentoring students on good decision-making skills</li> <li>○ elevating issues to the appropriate level</li> <li>○ counseling and mentoring students on personal issues, stress, Special Needs, depression, conflicts, social adaptability, financial management, and academic performance</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Motivate students</li> <li>• Communicate effectively</li> <li>• Create a climate of class cohesion, team building, and mutual support</li> <li>• Mentor students on good decision- making</li> <li>• Report issues to appropriate level</li> <li>• Apply appropriate intervention strategies for stress, Special Needs, depression, conflicts, social adaptability, financial management, and academic performance</li> <li>• Utilize appropriate resources as needed</li> <li>• Counsel students on organizational policies related to self-disenrollment</li> </ul>	<ul style="list-style-type: none"> <li>• Professional AppTrain student/instructor relationships formed</li> </ul>	

## 2.2. Stakeholders

There are three types of stakeholders for the SAT program.

### Upstream Stakeholders

Several stakeholders play a role in providing SAT program, performing the actual design, development, delivery, and maintenance of the program. The key upstream stakeholders are the following:

- Mr. Edwin Mahoney, SPD Director
- Ms. Kay Carter, Human Resources Manager
- Mr. Clay Donnelly, SPD Training Consultant
- Peer Trainers

### Direct Impactees

The past and future participants of the SAT program are the direct impactees of the program. They are all new instructors within ALPHA's seven AppTrain programs.

- At the time of writing this project, 100 instructors have completed the program between 2018-2019.
- About 50 instructors will complete the program next year.
- Thus, the direct recipients group comprises a total of approximately 50 new instructors per year.

### Indirect Impactees

Success or failure of the SAT program impacts not only the immediate recipients of the program (new instructors), but also other groups:

- AppTrain students (n = Approx. 850 per year)
- Instructor colleagues of impacted direct impactees
- Supervisors of impacted direct impactees
- ALPHA support personnel (engineering, administrative-customer service, police department, etc.)

The primary indirect impactees of the program are AppTrain students led by instructors who complete the program. This includes approximately 850 students per year.

The secondary indirect impactees of the program are instructors (n=unknown, likely hundreds per year) who closely interact with the AppTrain students led by their instructor peers who have completed the program.

Supervisors of instructors who complete the program are also affected by the quality of leadership and administrative support provided to AppTrain students.

External customers (n=unknown, likely thousands per year) are also affected by the quality of the products that they receive, which is indirectly impacted by the organizational leadership and culture that this leadership training program aims at improving.

### 3. EVALUATION METHODOLOGY

#### 3.1. Evaluation Purpose and Type

Based on discussions with Mr. Donnelly (Training Consultant/Client), Mr. Mahoney (SPD Director), and Ms. Carter (Human Resources Manager), the evaluation team discovered that the evaluation findings would be used by:

1. Mr. Donnelly--to further improve the training program's content, instructional materials, and schedule.
2. Supervisors--to potentially add other necessary environmental supports to ensure that new student advisors get up to speed as quickly as possible and then maintain desired performance.

Because the upstream stakeholders intend to use the evaluation findings to identify areas for improvement, the team conducted a formative goal-based evaluation. Specifically, the formative evaluation aimed at assessing how well the program is designed and supported to help new student advisors develop the requisite knowledge, skills, and attitudes to assist students with removing barriers to the successful completion of their training program. Therefore, it was a goal-based evaluation, focusing on the program's worth. The evaluation results will be used to make necessary improvements to close gaps in expected key results and business goals.

The evaluation team also incorporated a goal-free evaluation approach to find out if there were any unintended positive or negative side effects resulting from the program.

#### 3.2. Dimensions, Evaluation Questions, and Importance Weighting

The evaluation team met with the SPD Training Consultant (the client) and the Human Resources Manager to review the key elements of the training impact model for the SAT program (see Table 4 in the previous section). These two key stakeholders were then asked to identify the 2-4 items most closely aligned with their intended use of the evaluation findings. They agreed on investigating three dimensions of the program. Once the dimensions were determined, the evaluation team solicited input from the SPD Director, Human Resources Manager, and client to identify the relative degrees of importance weighting (IW) among the dimensions. Results are shown below (also see the first column of Table 5):

1. Training Graduates' Performance (Critical)
2. Course Design (Very Important)
3. Post-Training Support (Very Important)

#### 3.3. Data Collection Procedure and Methods

As the overall approach to this evaluation, the evaluation team followed Chyung's (2019) 10-step evaluation procedure. The 10-step procedure assisted the evaluation team with designing an evaluation based on the stakeholders' needs and the stakeholders' intended use of the evaluation findings. The evaluation team also used the first and third levels of the four-level training evaluation framework (Kirkpatrick, 1996) to evaluating the first and second dimension:

You may use this project sample for your learning purposes only. You may not copy, cite, reproduce, or distribute any content without written permission of the authors.

- Training Graduates' Performance (Level 3 Behavior, based on graduates' and supervisors' inputs about how well the training graduates transfer their new learning to their role as student advisor)
- Course Design (Level 1 Reaction, based on participants' and instructors' inputs about how well the program employs appropriate instructional and motivational strategies to support trainee learning, confidence, and transfer)

The evaluation team also applied Brinkerhoff's (2006) Success Case Method while evaluating Dimensions 1 and 3, to investigate the factors that influence SAT graduates' successful and non-successful application of their knowledge and skills in their new role as student advisors.

While incorporating these frameworks, the evaluation team used multiple sources of data, including the SAT instructors, SAT graduates (program participants), and the supervisors of SAT graduates. Additionally, the evaluation team used multiple types of data collection methods:

- Survey—Web-based, structured survey questionnaires was administered.
- Interview—Semi-structured in-person/telephone interviews were conducted.
- Extant data review—Existing SAT schedules, instructional materials, Level 1 evaluation data from AppTrain students, as well as schoolhouse support programs and documents were reviewed.
- Observation— SAT session was observed on site.

The multiple types of data collection methods were selected to complement the strengths and weaknesses of each method, and the data collected from multiple types/sources were triangulated to draw credible conclusions. To avoid drawing biased conclusions:

- All three evaluation team members compared their analysis and interpretation of extant data.
- The team used a three-step coding process. Each transcript was initially coded by the individual who performed the interview. A second team member then reviewed the coding. The primary coder then considered the second coder's suggestions and finalized the coding.

Data collection methods and instruments are provided in [Appendix B. Instruments and Rubrics](#).

## 4. EVALUATION RESULTS

This evaluation investigated how well SAT is designed and supported to help new student advisors develop the requisite knowledge, skills, and attitudes to assist students with removing barriers to the successful completion of their training program. Three dimensions were investigated, and results are captured below.

### 4.1. Training Graduates' Performance

This dimension investigated how well the training graduates transfer new learning to their new role as student advisor. The evaluation team rated training graduates' performance as "Critical" based on stakeholder input during importance weighing.

Data collection included the following methods and sources:

- Web-based survey with all SAT 2018-2019 training graduates (n=100)
- In-person and telephone interviews with success (n=3) and nonsuccess (n=3) cases
- Web-based survey with supervisors of SAT 2018-2019 training graduates (n=14)
- Extant data review by evaluators of 2018-2019 Level 1 Evaluation Report: Student Advisor and Barriers to Success (AppTrain) (n = 4)

Table 5 contains data collected and a brief description of analysis results.

**Table 5. Graduate Performance Data Analysis**

<b>Data Collected</b>	<b>Analysis Result</b>	<b>Rubric Result</b>
Web-based survey with all SAT 2018-2019 training graduates (n=16):	<b>Quantitative:</b> The lowest scores were in time spent on practical application of learning (modeling professionalism [2.7], 4-Bs of communication [2.6], utilization of the SAG [2.9], and intervention with students showing low motivation [3.1]).  <i>Low quantitative scores may indicate that graduates have not yet encountered situations in which they could apply their learning.</i>	<b>Needs Improvement</b>
Interviews with success (n=3) and nonsuccess (n=3) cases	<b>Qualitative:</b> Mixture of positive and negative comments. Most negative comments pertained to on-the-job stress.	<b>Acceptable</b>
Web-based survey with supervisors of SAT 2018-2019 training graduates (n=5):	<b>Quantitative:</b> Average scores were 4.4 or higher.	<b>Acceptable</b>
2018-2019 Level 1 Evaluation Report: Student Advisor and Barriers to Success (AppTrain) (n = 4 evaluation periods):	Potential inconsistencies in student advisors' meeting performance expectations, handling administrative responsibilities, and forming effective student/ instructor relationships.	<b>Needs Improvement</b>

Analysis of the collected data identified the quality of this dimension as **Needs Improvement**. The rating was based on analysis of the data using the rubric shown in Table 6. Rubrics for individual data collection instruments are provided in [Appendix B Instruments and Rubrics](#). Data visualizations are provided in [Appendix H Data Collection Results for Dimension 1: Training Graduates' Performance](#).

**Table 6. Training Graduates' Performance Rubric**

Superior	Acceptable	Needs Improvement	Not Acceptable
All sources indicate superior.	All sources indicate either superior or acceptable.	No more than one data source indicates not acceptable.	More than one data source indicates not acceptable.

## 4.2. Course Design

This dimension investigated how well the program employs appropriate instructional and motivational strategies to support trainee learning, confidence, and transfer. The evaluation team rated course design as “Very Important” based on stakeholder input during importance weighing.

Data collection included the following methods and sources:

- Web-based survey with all SAT 2018-2019 graduates (n=100)
- Web-based, self-administered, anonymous survey with all 2018 - 2019 SAT instructors (n = 10)
- On-site classroom observation by one evaluation team member
- Extant data review by evaluators of all training schedules and instructional materials

The following data were collected and analyzed:

- Web-based survey with all SAT 2018-2019 graduates (n=16): **Needs Improvement**
- Web-based, self-administered, anonymous survey with all 2018 - 2019 SAT instructors (n = 6): **Acceptable**
- WS-V.2 Classroom Observation Checklist: **Needs Improvement**

Table 7 contains data collected and a brief description of analysis results.

**Table 7. Course Design Data Analysis**

Data Collected	Analysis Result	Rubric Result
Web-based survey with all SAT 2018-2019 graduates (n=16)	<b>Quantitative:</b> The lowest scores were in time spent on practical application of learning (practicing mentoring skills [3.5], practicing counseling skills [3.5], using resources [3.4], and addressing increasingly complex scenarios [3.4]).	<b>Needs Improvement</b>

Data Collected	Analysis Result	Rubric Result
	<b>Qualitative:</b> Mixture of positive and negative comments. Negative comments addressed the agenda and schedule.	
Web-based, self-administered, anonymous survey with all 2018 - 2019 SAT instructors (n = 6)	<b>Quantitative:</b> The lowest scores were in effective testing of student skills [4.2], instructor guide detail [4.3], and sufficient student practice [4.5]. <b>Qualitative:</b> Mostly positive comments with a few recommendations for improvement.	<b>Acceptable</b>
WS-V.2 Classroom Observation Checklist	Mixture of Go and No Go. Overall effective course design with some recommendations for improvement.	<b>Needs Improvement</b>

Analysis of the collected data identified the quality of this dimension as **Needs Improvement**. The rating was based on analysis of the data using the rubric shown in Table 8). Rubrics for individual data collection instruments are provided in [Appendix B Instruments and Rubrics](#). Data visualizations are provided in [Appendix I Data Collection Results for Dimension 2: Course Design](#).

Table 8. Course Design Rubric

Superior	Acceptable	Needs Improvement	Not Acceptable
All sources indicate superior.	All sources indicate either superior or acceptable.	No more than one data source indicates not acceptable.	More than one data source indicates not acceptable.

### 4.3. Post-Training Support

This dimension investigated how well graduates are supported by environmental factors (as defined by Chevalier's (2003) Updated Behavioral Engineering Model) in their role as student advisor after returning to the workplace. The evaluation team rated course design as "Very Important" based on stakeholder input during importance weighing.

Data collection included the following methods and sources:

- Web-based survey with all SAT 2018-2019 graduates (n=100)
- In-person and telephone interviews with success (n=3) and nonsuccess (n=3) cases.
- Web-based survey with supervisors of SAT 2018-2019 graduates (n=14)

- Extant data review by evaluators of individual schoolhouse supporting programs such as performance support tools, Job Qualification Requirements (JQR), and Standard Operating Procedures (SOP).

Table 9 contains data collected and a brief description of analysis results.

**Table 9. Post-Training Support Data Analysis**

<b>Data Collected</b>	<b>Analysis Result</b>	<b>Rubric Result</b>
Web-based survey with all SAT 2018-2019 graduates (n=16):	<p><b>Quantitative:</b> The lowest scores were in clearly defined processes and procedures [2.3], efficient processes and procedures [2.7], and meaningful incentives [2.9].</p> <p><b>Qualitative:</b> Responses to open-ended survey questions indicated positive experiences with resources such as chaplains and peers student advisors.</p>	<b>Needs Improvement</b>
Interviews with success (n=3) and nonsuccess (n=3) cases	<b>Qualitative:</b> Mixture of positive and negative comments. Most negative comments pertained to resources, processes, and procedures.	<b>Needs Improvement</b>
Web-based survey with supervisors of SAT 2018-2019 graduates (n=5):	<b>Quantitative:</b> Average scores were 4.2 or higher.	<b>Acceptable</b>
Applicable documents or input from all ALPHA schoolhouses	Inconsistent post-training support resources between schoolhouses. Some schools use comprehensive qualification plans, schoolhouse specific SAGs, and student advisor checklists while others depend on the ALPHA SAG.	<b>Needs Improvement</b>

Analysis of the collected data identified the quality of this dimension as ***Needs Improvement***. The rating was based on analysis of the data using the rubric shown in Table 10. Rubrics for individual data collection instruments are provided in [Appendix B Instruments and Rubrics](#). Data visualizations are provided in [Appendix J: Data Collection Results for Dimension 3: Post-Training Support](#).

**Table 10. Post-Training Support Rubric**

<b>Superior</b>	<b>Acceptable</b>	<b>Needs Improvement</b>	<b>Not Acceptable</b>
All sources indicate superior.	All sources indicate either superior or acceptable.	No more than one data source indicates not acceptable.	More than one data source indicates not acceptable.

## 5. CONCLUSIONS

### 5.1. Overall Quality

Analysis of the data gathered during the evaluation project revealed that there are many strengths to the current SAT program. The organization is seeing beneficial results by means of the course design, training graduates' application of learning, and environmental factors that support transfer. By maintaining and expanding upon what is working well, the SAT program will position student advisors for even greater success in the removal of barriers to students' successful completion of their training program (see Table 11).

**Table 11. Dimensions and Overall Results**

<b>Dimension</b>	<b>Training Impact Model</b>	<b>Importance Weighting</b>	<b>Results</b>
<b>1. Training Graduates' Performance</b>	Critical Actions	Critical	Needs Improvement
<b>2. Course Design</b>	Resources and Activities	Very Important	Needs Improvement
<b>3. Post-Training Support</b>	Resources and Activities	Very Important	Needs Improvement

### 5.2. Recommendations

Although student advisors describe SAT as beneficial and generally overcome obstacles to perform at a high standard, the evaluation team uncovered several challenges faced by new student advisors. Common themes include varying leadership experiences that create communication inequities, administrative challenges caused by inaccurate or outdated resources, and lack of post-training support programs and processes. To overcome common student advisor challenges, the evaluation team recommends minor changes to curriculum, course schedule, and instructional materials; improved access to up-to-date resources; and increased workplace support programs. Understanding that differences in course lengths create varying needs amongst schoolhouses, the team hopes that these recommendations will help Mr. Donnelly implement best practices across ALPHA.

Table 12 identifies recommendations for Dimension One: Training Graduates' Performance; Table 13 identifies recommendations for Dimension Two: Course Design; and Table 14 identifies recommendations for Dimension Three: Post-Training Support. Within each table, recommendations are listed in order of priority based on the intended use of these evaluation results.

Table 12. Training Graduates Performance Recommendations

Graduate Performance Issue	Recommendation/ Explanation
<p><b>Mentoring/Counseling AppTrain students:</b></p> <p>Student advisors demonstrate inconsistencies in their response to complex situations.</p>	<p><b>RECOMMENDATION</b></p> <p>Update the current course module on recognizing at-risk AppTrain students to include more individual feedback and practice.</p> <p><b>EXPLANATION</b></p> <p>Most common AppTrain student issues reported by <b>students</b> are financial problems, family problems/support issues, and inappropriate personal relationships. Lesser reported situations with higher consequences include risky behavior while on liberty, driving under the influence, and underage drinking (see <a href="#">Appendix H Data Collection Results For Dimension 1: Training Graduates' Performance</a>).</p> <p>Most common AppTrain student issues reported by <b>student advisors</b> are stress, poor decision making, academic performance, personal issues, depression, roommate conflicts, poor social skills, and special needs (see <a href="#">Appendix H. Data Collection Results For Dimension 1: Training Graduates' Performances</a>).</p> <p>Differences in common situations reported may indicate that student advisors are maintaining high standards of confidentiality when handling student issues; as a result, student advisors may not be widely aware of student issues beyond their class. However, differences may also indicate that students are facing challenges without student advisor knowledge.</p> <p>Student advisor effectiveness in responding to these situations depends on leadership experience. Some student advisors report confidence in mentoring students during challenging situations while others report struggling.</p> <p>SAT currently employs group work strategies during scenarios. During group work, a few team members with leadership experience may mask the inability of those with less experience to effectively identify a student-at-risk. Providing individual trainees with opportunities to practice identifying and responding to at-risk AppTrain students during SAT will bolster trainee confidence in a low-risk environment (Keller, 2010) and identify those in need of additional support.</p>
<p><b>Effective Communications:</b></p> <p>Many student advisors do not explicitly use the 4-B's of</p>	<p><b>RECOMMENDATION</b></p> <p>Add 4-B's of communication exercises to in-class scenarios.</p>

Graduate Performance Issue	Recommendation/ Explanation
communication	<p><b>EXPLANATION</b></p> <p>According to Merrill’s (2002) First Principles of Instruction, learning is promoted when new knowledge is applied by the learner. Incorporating the 4-B’s into scenario debrief sessions will enable learners to consider how they applied the model during practice. Learning is promoted when learners are required to explain their reasoning (Clark, 2008).</p>
<p><b>Administration:</b></p> <p>Many students report dissatisfaction with student advisor administrative performance.</p>	<p><b>RECOMMENDATION</b></p> <p>Consider conducting a focus group of new and experienced student advisors from all schoolhouses to determine confusion points and update references accordingly.</p> <p><b>EXPLANATION</b></p> <p>Some schoolhouses utilize the SAG for administrative guidance whereas other schoolhouses maintain separate guidance.</p> <p>Differences in school lengths and required administrative tasks increase the need for clear guidance.</p>

Table 13. Course Design Recommendations

Course Design Issue	Recommendation/ Explanation
<p><b>Curriculum:</b></p> <p>Training is not relevant to all individual schoolhouse applications.</p>	<p><b>RECOMMENDATION</b></p> <p>Provide students the opportunity to practice using schoolhouse-specific resources during training.</p> <ul style="list-style-type: none"> <li>● Create a central student advisor repository to house accurate and up-to-date schoolhouse documents and SAG.</li> <li>● Hold training in computer lab so that students can access their actual schoolhouse checklists and tracking documents.</li> <li>● Develop scenarios and case studies that prompt students to use their schoolhouse’s actual checklists/resources and an online version of the SAG.</li> </ul> <p><b>EXPLANATION</b></p> <p>Keller (2010) recommends tying the instruction to real-world application.</p>
<p><b>Training Schedule:</b></p> <p>Instructors aboard longer AppTrain programs often experience a 6 - 10 month time gap between training and becoming a student advisor.</p> <p>Training does not cover aspects that differ from schoolhouse to schoolhouse.</p> <p>Instructors attend SAT before fully acclimating to ALPHA, and some are thrown into the role of break-in student advisor before attending SAT training.</p>	<p><b>RECOMMENDATION</b></p> <p>Either conduct SAT for individual schoolhouses on different schedules closer to the actual class pickup date, or develop a SAT refresher that schoolhouses can deliver to new student advisors during student training week.</p> <p><b>EXPLANATION</b></p> <p>When new knowledge and skills are not used, research on the Forgetting Curve proves that, after only one hour, trainees will have already forgotten 50% of the content learned during training, 70% after one day, and 90% after one week (Kohn, 2014).</p> <p>New student advisors should use newly learned or freshly reinforced, schoolhouse-specific material right away with their first class.</p>

Course Design Issue	Recommendation/ Explanation
<p><b>Agenda:</b></p> <p>Students report too much time is spent at the beginning of the day reiterating the <i>why</i> for training, leading to compressed training modules later in the day.</p>	<p><b>RECOMMENDATION</b></p> <p>Reduce the time spent on the <i>why</i> to 15 minutes, using the time saved for more application of learning in scenario-based decision-making and role playing. Alternatively, consider extending the course to two days.</p> <p><b>EXPLANATION</b></p> <p>One interviewee noted that training is reduced by at least two hours due to performance introductions and lunch. Interviewees and the observer noted that afternoon modules felt rushed and that SAT would benefit from an additional 4-8 hours of training.</p> <p>An extended course could be designed to allocate more time to the Application Phase as recommended by Merrill (2002):</p> <p><b>Practice Consistency</b></p> <p>The kind of practice must be consistent with the instructional goals. In the case of SAT, the primary goal is for student advisors to apply their learning in the workplace to help students remove barriers to the successful completion of their training program. <a href="#">Appendix H Data Collection Results For Dimension 1: Training Graduates' Performance</a> shows a tally of the complex, ill-structured issues for which student advisors provide support to students. With the inclusion of scenario-based decision-making and role play activities, SAT already recognizes that far-transfer performance requires not only knowledge about policies, procedures, communication models, etc., but also practice in recognizing when a particular situation could benefit from the application of specific knowledge and skills (Clark, 2008).</p> <p><b>Varied Problems</b></p> <p>With an extended schedule, SAT could provide more varied practice for the on-the-spot problem solving and decision-making that will be required of student advisors. Interviewees indicated that the scenario-based decision-making and role play activities currently included in SAT have assisted them with transferring their learning to the role of student advisor.</p> <p><b>Diminishing Coaching</b></p> <p>As the counseling component of the student advisor role requires complex decision-making, training participants require diminishing coaching until they are able to apply best practices to diverse situations. To help make invisible aspects of decision-making visible, peer instructors need to share expert thinking (e.g., what is critical,</p>

Course Design Issue	Recommendation/ Explanation
	difficult) while trainees are applying their new knowledge and skills. Coaching will assist trainees with recognizing errors, recovering from errors, and avoiding errors in the future during performance (Merrill, 2002).
<p><b>Instructor Guide:</b></p> <p>Instructors Guides (IG) leverage “Tribal Knowledge” passed through Peer Instructor Stories</p>	<p><b>RECOMMENDATION</b></p> <p>While continuing to allocate time for instructors to share stories, revise IGs to include more “need-to-know” information for each topic and instructor-led demonstrations for scenarios. Instructors should talk through the decision-making process during the demonstration scenario--indicating why and how decisions were made.</p> <p><b>EXPLANATION</b></p> <p>Peer instructors’ personal stories add value through vicarious reinforcement of success (Gagné &amp; Medsker, 1996). However, the idea of “tribal knowledge” has crept into student advisor practice and reportedly hinders the process of learning to a standard by prioritizing community/peer learning. The interactive nature of worked-example scenarios provides deeper learning by bridging the gap between need-to-know information and application (Clark, 2008). See <a href="#">Appendix I Classroom Observation</a> for more information.</p>
<p><b>Student Guide:</b></p> <p>Students were not provided with a Student Guide (SG) which led to some student taking notes on blank pages in the SAG</p>	<p><b>RECOMMENDATION</b></p> <p>Create a separate SG that follows that provides necessary supplemental information to minimize and centralize student note-taking.</p> <p><b>EXPLANATION</b></p> <p>According to the <i>Signaling Principle</i> (Clark, 2008), highlighting information with bulleted lists drives student attention to important topics. Organization’s (2012) Standard Operating Procedure (SOP) Volume 5 also points to the usefulness of SGs in providing supplemental information during exercises that follows classroom instruction. Further, when students take notes during an instructor-led class, this can lead to what is known as the <i>split attention effect</i>. In other words, working memory’s limited cognitive resources are diverted away from processing content in ways that lead to learning (Clark, 2008).</p>

Table 14. Post-Training Support Recommendations

Post-Training Support Issue	Recommendation/ Explanation
<p><b>Resources: Professional Development Processes</b></p> <p>Lack of post-training processes and systems to support the continued development of necessary knowledge, skills, and attitudes for desired performance.</p>	<p><b>RECOMMENDATION</b></p> <p>Develop an integrated professional development solution system consisting of the following:</p> <ol style="list-style-type: none"> <li><b>1. Mentoring</b> <p>Each schoolhouse should implement a formal mentoring process to guide new student advisors through the process of overseeing their first class.</p> </li> <li><b>2. In-Person Follow-Up Workshops</b> <p>At predetermined intervals (e.g., each month), new student advisors could be surveyed to identify the topics for which they require more professional learning based on their current context. Subsequent workshops would then be tailored to their unique needs, supporting the community of learners established during the training. The workshops would serve as a forum for the building of shared knowledge regarding best practices (DuFour, DuFour, &amp; Eaker, 2008), including reinforcement of relevant topics, Q &amp; A, and the sharing and vetting of ideas.</p> </li> <li><b>3. Asynchronous or Quasi-Synchronous Follow-Up</b> <p>Use a digital tool (e.g., email, blog, discussion forum, instant messaging) which supports multimedia information, including text, images, audio, and video. So (2016) found significant gains in learning when mobile instant messaging (MIM) was used to provide learning opportunities beyond the classroom. Poll student advisors to ascertain at what time of day they would prefer to receive communications. At predetermined intervals, send out bite-sized chunks of information. Consider asking questions or providing discussion prompts and then inviting student advisors to engage in conversation.</p> </li> </ol> <p><b>EXPLANATION</b></p> <p>Schoolhouse implementation of formal mentoring and development processes varies. In some cases, this creates additional stress for new student advisors. See <a href="#">Appendix J DATA COLLECTION RESULTS FOR DIMENSION 3: POST-TRAINING SUPPORT</a>, for a summary of Schoolhouse Post-Training Support resources.</p>

Post-Training Support Issue	Recommendation/ Explanation
	<p><b>Reshaping the Forgetting Curve</b></p> <p>Deployment of a blended after-training program which includes cognitive, social, and behavioral reinforcement (Kohn, 2016) will reshape the forgetting curve. Research demonstrates that distributed practice, or practice that is spaced over time, significantly improves long-term retention (Brown, Roediger, &amp; McDaniel, 2014; Clark, 2008; Clark &amp; Mayer, 2016).</p> <p><b>Tips for Mentoring Programs</b></p> <p>Johnson and Andersen (2010, pp. 122-124) provide six best practices for mentoring programs:</p> <ol style="list-style-type: none"> <li>1. Develop a master strategy before implementing mentoring programs.</li> <li>2. Avoid mandatory programs: Facilitate a sense of choice.</li> <li>3. Demonstrate top-down support for mentoring.</li> <li>4. Develop a mentoring continuum.</li> <li>5. Select mentors carefully.</li> <li>6. Develop high-quality training programs for mentors.</li> </ol>
<p><b>Resources: Time</b></p> <p>Workplace demands of dual role (i.e., content instructor and student advisor)</p> <ul style="list-style-type: none"> <li>• Survey Question: <i>I have enough time to effectively carry out my duties as both a student advisor and an instructor.</i></li> <li>• Average Response: For the seven student advisors who completed the survey, the average response fell between <i>Slightly disagree</i> and <i>Slightly agree</i> (3.3).</li> </ul>	<p><b>RECOMMENDATION</b></p> <p>Individual schoolhouses should provide student advisors with designated prep periods each week.</p> <p><b>EXPLANATION</b></p> <p>Survey and interview responses reveal that new student advisors do not have enough time during the workday to get the lay of the land, qualify to teach their curriculum, complete paperwork, support students with various needs, and meet with a mentor--while teaching eight hours per day.</p> <p>Student advisors serving in longer AppTrain programs are most susceptible to increased stress during the later stages of training. Extended periods of time in a distressed state can negatively impact student advisors' physical and mental health--which can in turn negatively impact students' learning experience. Many organizational units have implemented "Professional Development" hours during the week. Providing employees with self-directed time during the regular workday increases creativity and job satisfaction (Pink, 2009).</p>

Post-Training Support Issue	Recommendation/ Explanation
<p><b>Resources: Feedback</b></p> <p>Lack of positive feedback from supervisors</p> <ul style="list-style-type: none"> <li>• Survey Question: <i>My supervisor provides me with regular feedback on my performance.</i></li> <li>• Average Response: For the seven student advisors who completed the survey, the average response fell between <i>Slightly disagree</i> and <i>Slightly agree</i> (3.4).</li> <li>• Survey Question: <i>The incentives offered for meeting performance expectations are meaningful to me.</i></li> <li>• Average Response: For the seven student advisors who completed the survey, the average response fell between <i>Slightly disagree</i> and <i>Slightly agree</i> (2.9).</li> </ul>	<p><b>RECOMMENDATION</b></p> <p>Supervisors should seek more opportunities to provide student advisors with feedback to ensure they are on track with meeting the general expectations of the role as well as individual goals identified in qualification plans and performance reviews. Specifically, supervisors should seek more opportunities to recognize desired performance.</p> <p><b>EXPLANATION</b></p> <p>Research shows that desired performance tends to diminish in the absence of at least periodic reinforcement that performers find favorable (Mager &amp; Pipe, 1976; Hiatt, 2006). Hiatt (2006) provides tips for providing effective reinforcement:</p> <ul style="list-style-type: none"> <li>• Ensure that the recognition or reward is meaningful to the individual.</li> <li>• Associate the reinforcement with specific efforts, progress, or accomplishments.</li> </ul>
<p><b>Resources: Tools</b></p> <p>SAG seems outdated to some and fails to serve as a “one stop shop.”</p> <p>Not all student advisors refer to the SAG when they have questions about their duties.</p> <p>Not all student advisors know where to find an updated version of the SAG.</p>	<p><b>RECOMMENDATION</b></p> <p>Discontinue printed versions of SAG; instead drive student advisors to the online version. The SAG could be housed in a student advisor central repository with updated resources.</p> <p><b>EXPLANATION</b></p> <p>Schoolhouse usage of ALPHA or schoolhouse-specific SAG varies. Multiple iterations of documents creates additional stress on new student advisors. See <a href="#">Appendix J DATA COLLECTION RESULTS FOR DIMENSION 3: POST-TRAINING SUPPORT</a>, for a summary of Schoolhouse Post-Training Support resources.</p> <p>Various iterations of the SAG are circulating in hard copy or stored digitally; as a result, student advisors lose time trying to ascertain which version accurately reflects current practice or following outdated processes and procedures.</p>

## 6. META-EVALUATIONS AND LIMITATIONS

To improve evaluation quality and execution, the team conducted a series of meta-evaluations. These include:

- A peer review of the team’s instrument design helped the team modify the instruments. The modifications increased the alignment between best-practice design methods, what the team wanted to learn through data collection, and how the design would improve their analysis of the data.
- A peer review of ethics brought to attention that the team would need to be cognizant of coercive power to bolster survey results. Due to unforeseen forces that impacted ALPHA systemically, the team was faced with how to ethically address limited data availability, how to bolster it without compromising the validity of the data, and how to best analyze small data collections. The peer discourse was helpful to vet viable approaches to ethically communicate with the client and convey findings accurately.
- A peer review of internal and external consultant roles raised the team’s awareness of differences between the two and how bias could potentially impact the rigor of their evaluation. Through these introspection activities, the team determined how to best mitigate risk of that bias with best practice strategies.
- External peer and expert reviews of this report was conducted to ensure that the principles of value and ethics were upheld. In their effort to provide a meaningful and actionable deliverable to the client, the team was able to make improvements that improved readability and usability.

Despite a systematically and systemically designed program evaluation, this project met with unanticipated happenings that resulted in certain limitations. The context in which the results should be interpreted are presented here:

- **Statistical limitations** of the study resulted from a much lower survey response rate than anticipated. Only 16 of a possible 100 SAT graduates completed the survey. Further, only seven of these respondents had actually served in the role of student advisor. The team hypothesizes that survey response was negatively impacted by the wildfires in the two weeks preceding data collections. When the survey recruitment email was sent out, base personnel were just returning to normal operations following power outages, heavy smoke, and the threat of evacuation.
- **Impact limitations** of the evaluation resulted from the fact that only a subset of the entire SAT graduate schoolhouse population agreed to participate in the following types of data collection. Of the seven total schoolhouses:
  - The 12 survey respondents who provided their name represented only four schoolhouses (i.e., Trade Specialty 1, Trade Specialty 2, Trade Specialty 3, and Trade Specialty 4).

- The six interviewees selected from the pool of respondents were those who had previously served in the role of student advisor. They represented only two schoolhouses (i.e., Trade Specialty 1 and Trade Specialty 2).

Nonetheless, the results of this evaluation contribute to the overall picture of SAT's impact on organizational goals. Further, this project serves as a foundation for future evaluations.

## 7. REPORTING

Evaluation team member, Thomas Frazier, will deliver a read-ahead copy of the evaluation report and schedule a follow-on meeting with the client, Mr. Clay Donnelly. During this meeting, Thomas Frazier will review the evaluation, the findings, and the recommendations for improving the ALPHA SAT program.

Any questions pertaining to this report, of its findings, or to request a full copy of the evaluation report can be directed to Thomas Frazier.

## REFERENCES

- American Evaluation Association (2018). *Updated guiding principles for evaluators*. Retrieved December 8, 2019 from <https://www.eval.org/>
- Brinkerhoff, R. O. (2006). *Telling training's story: Evaluation made simple, credible, and effective*. San Francisco, CA: Berrett-Koehler.
- Brown, P. C., Roediger, H. L., III, & McDaniel, M. A. (2014). *Make it stick: The science of successful learning*. Cambridge, Massachusetts: Belknap Press of Harvard University Press.
- Chevalier, R. (2003). Updating the Behavior Engineering Model. *Performance Improvement*, 42(5), 8-14. <http://dx.doi.org/10.1002/pfi.4930420504>
- Chyung, S. Y. (2019). *10-step evaluation for training and performance improvement*. Thousand Oaks, CA: Sage.
- Clark, R. (2008). *Building expertise: Cognitive methods for training and performance improvement* (3rd ed). San Francisco, CA: Pfeiffer.
- Clark, R. C., & Mayer, R. E. (2016). *e-Learning and the science of instruction: Proven guidelines for consumers and designers of multimedia learning*. Hoboken, NJ: John Wiley and Sons.
- DuFour, R., DuFour, R. & Eaker, R. (2008). *Revisiting professional learning communities at work: New insights for improving schools*. Bloomington, IN: Solution Tree.
- Gagné, R. M., & Medsker, K. L. (1996). *The conditions of learning: Training applications*. Orlando, FL: Harcourt Brace College Publishers.
- Haugen, J., & Lucas, K. (2019) Unify and present: Using monroe's motivated sequence to teach team presentation skills. *Communication Teacher*, 33(2), 112-116.
- Hiatt, J. M. (2006). *Adkar: A model for change in business, government, and our community* (1st ed.). Fort Collins, Colorado: Prosci Learning Center Publications.
- Johnson, W. B., & Andersen, G. R. (2010). Formal mentoring in the U.S. military: Research evidence, lingering questions, and recommendations. *Naval War College Review*, 63(2), 113-126.
- Keller, J. M. (2010). *Motivational design for learning and performance: The ARCS model approach*. New York, NY: Springer. <http://dx.doi.org/10.1007/978-1-4419-1250-3>
- Kirkpatrick, D. (1996). *Evaluating training programs: The four levels*. San Francisco, CA: Berrett-Koehler.

Kohn, A. (2014a, March 13). *Brain science: The forgetting curve—the dirty secret of corporate training*. Retrieved from <http://www.learningsolutionsmag.com/articles/1379/brain-science-the-forgetting-curve-the-dirty-secret-of-corporate-training>

Kohn, A. (2016, Fall). *Deploying an After-Training Program*. Retrieved from [http://www.nxtbook.com/nxtbooks/trainingindustry/tiq\\_2016fall/index.php#/56](http://www.nxtbook.com/nxtbooks/trainingindustry/tiq_2016fall/index.php#/56)

Mager, R., & Pipe, P. (1976). You really oughta wanna: Or how not to motivate people. *Nursing*, 6(8), 65-69.

Merrill, M. (2002). First Principles of Instruction. *Educational Technology Research and Development*, 50(3), 43-59.

Mindtools. (2019). *Monroe's motivated sequence: Perfecting the call to act*. Retrieved December 3, 2019 from <https://www.mindtools.com/>

Pink, D. (2009). *Drive: The surprising truth about what motivates us*. New York, NY: Penguin Random House LLC.

So, S. (2016). Mobile instant messaging support for teaching and learning in higher education. *The Internet and Higher Education*, 31, 32-42.

Yarbrough, D. B., Shula, L. M., Hopson, R. K., & Caruthers, F. A. (2010). *The program evaluation standards: A guide for evaluators and evaluation users* (3rd. ed). Thousand Oaks, CA: Corwin Press.

Organization. (2012). *Training System Standard Operating Procedures (SOP) Volume 5 Resident Instruction*.

## APPENDIX A: FEASIBILITY AND RISK FACTORS

### Feasibility

The following summarizes the evaluation team’s assessment on project feasibility:

1. **Maturity.** The SAT program was implemented in 2006, with session offerings 3 times per year. The training is provided to 40-50 new instructors annually, providing both enough historical data and access to resources to generate additional data about what how well the SAT program is designed and supported to achieve the program goal and what should be changed. Most recently, the program provided training to 100 graduates in 2018-2019.
2. **Scope.** The project was completed within the requested time frame of 8 weeks.

The scope of work, stakeholders involved, and duration for each task are described in Table A-1 and Figure A-1. Figure A-1 is a Gantt chart illustrating the overall timeline. Any necessary changes were determined through discussion with the client.

The following timeline represents all phases of the evaluation:

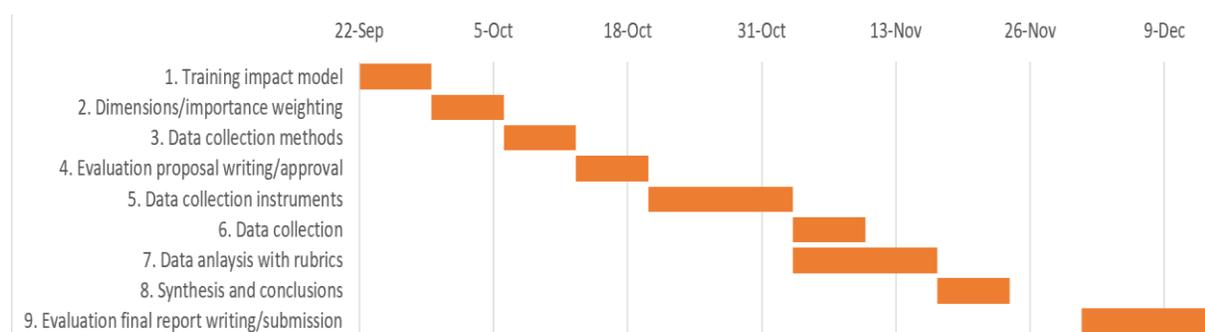
- Data collection instrument development—October 20<sup>th</sup> through November 2<sup>nd</sup>
- Data collection—November 3 through November 9
- Data analysis—November 3 through November 16
- Draw conclusions--November 17 through November 30
- Preparation of a final report—December 1 through December 14
- Delivery of a final report to the client—December 16

Table A-1 Scope of Work and Timeline

Task	Participating Stakeholders	Start Date (Duration)
1. Identified or developed a training impact model for the program. <ul style="list-style-type: none"> <li>● The evaluation team offered a one-hour kick-off workshop to the stakeholders to draft out a training impact model.</li> <li>● The evaluation team followed up with stakeholders via telephone and/or email as well as in-person meetings to finalize the model.</li> </ul>	SPD Training Consultant SPD Resource Branch Manager	Sep. 22, 2019 (7 days)
2. Determined three to five evaluation dimensions, specific evaluation questions to be investigated, and relative degrees of importance weighting among dimensions. <ul style="list-style-type: none"> <li>● A one-hour meeting with stakeholders was scheduled.</li> </ul>	SPD Training Consultant SPD Resource Branch Manager	Sep. 29, 2019 (7 days)

Task	Participating Stakeholders	Start Date (Duration)
3. Determined specific data collection methods used for each dimension. <ul style="list-style-type: none"> <li>The information was communicated via email and telephone, as well as in-person.</li> </ul>	SPD Training Consultant	Oct. 06, 2019 (7 days)
4. Prepared an evaluation proposal and submitted it to the stakeholders to obtain approval. <ul style="list-style-type: none"> <li>The stakeholders provided feedback for necessary changes, helped finalize the evaluation implementation plan, and approved the plan.</li> </ul>	SPD Training Consultant	Oct. 13, 2019 (7 days)
5. Developed data collection instruments and obtained approval. <ul style="list-style-type: none"> <li>The evaluation team developed all required materials used to collect data and submitted them to the stakeholders for approval.</li> </ul>	SPD Training Consultant	Oct. 20, 2019 (14 days)
6. Collected data. <ul style="list-style-type: none"> <li>With the stakeholders' support (e.g., granting access to employees and extant data, encouraging employees to participate in the study), the evaluation team collected data.</li> </ul>	SPD Training Consultant Peer instructors Peer instructors' supervisors Graduates Graduates' supervisors	Nov. 03, 2019 (7 days)
7. Analyzed data with rubrics. <ul style="list-style-type: none"> <li>The evaluation team worked with the stakeholders to develop rubrics and analyzed collected data against the rubrics.</li> </ul>	SPD Training Consultant	Nov. 3, 2019 (14 days)
8. Drew conclusions. <ul style="list-style-type: none"> <li>The evaluation team combined dimensional results, made evidence-based conclusions, and developed recommendations.</li> </ul>	SPD Training Consultant	Nov. 17, 2019 (7 days)
9. Prepared an evaluation final report and submit it to stakeholders. <ul style="list-style-type: none"> <li>The evaluation team compiled an evaluation final report and submitted it to the stakeholders via email, and arranged a meeting with the stakeholders for a presentation and Q&amp;A.</li> </ul> <p>Note: While completing the tasks listed in this table, the evaluation team conducted internal and external meta-evaluations to ensure credibility of the methods used and conclusions drawn from the collected data.</p>	SPD Training Consultant	Dec. 1, 2019 (14 days)

Figure A-1 Gantt Chart



3. **Support.** The client, Mr. Clay Donnelly, the SPD Training Consultant and the other upstream stakeholders including the SPD Director, Human Resources Manager, and 5 Peer Trainers with whom the evaluation team has communicated have shown interest and support for the evaluation. The stakeholders were interested in using the formative goal-based evaluation findings to identify:

- Areas of strength in the SAT program’s design and support for implementation which can be standardized across training sessions and AppTrain operation.
- Areas for improvement.
- Recommendations for improvement.

Additionally, the evaluation team incorporated a goal-free evaluation approach to determine if there were unintended positive or negative side-effects resulting from the program. The client approved the team’s full access to existing extant data, including the training materials; and personnel, including SAT graduates, supervisors, and instructor groups. The team was permitted to gather data by phone, email, video conference, and in-person during employee work hours.

4. **Ethical Concerns.** All members of the evaluation team completed Collaborative Institutional Training Initiative (CITI), a web-based training program hosted by the University of Miami that offers training in human-subjects research protections and the responsible conduct of research. This training fulfilled Boise State University’s commitment to promote ethical conduct in projects and refreshed the evaluation team’s commitment to upholding the confidentiality of client data. In particular, the data collected from using the Success Case Method was sensitive. The team approached all potential concerns, referring to Joint Committee on Standards for Educational Evaluation (2010) and American Evaluators Association (2018) as our guiding principles to make best practice decisions in partnership with the client.

5. **Resources.** The following resources were used during this evaluation:

- Expertise/capacity
  - The evaluation team’s expertise in conducting program evaluations (level: developing). The project benefitted from having this three-member evaluation

- team, possessing the following skills: project management, web-based survey and interview design, data analysis, and writing.
- Dr. Seung Youn Chyung, a university instructor who supervised the project (level: expert)
  - The evaluation client's commitment in support of the SAT program evaluation (level: strong).
  - Funds
    - No additional financial costs were imposed on the client/organization.
  - Time
    - The evaluation team committed their time during the 8 weeks to implement the evaluation plan and submit a final evaluation report (approximately 700 hours, collectively).
    - The client and key stakeholders committed their time to provide necessary data and communicate with the evaluation team (6-8 hours, collectively).
    - Other stakeholders committed their time to participate in data collection activities (1-2 hours per person).
  - Facilities/communication
    - Interactions between the evaluation team and the client/stakeholders were done via email, telephone, or face-to-face at the client site. Team members collaborated and agreed upon messages prior to their communication to the client and other stakeholders. Thomas Frazier, the internal employee of the organization, served as the liaison between the evaluation team and the stakeholders.

The team completed the project within the expected timeframe and with established resources.

## Risk Factors

To ensure the successful completion of the project, the evaluation team monitored the following risk factors and collaborated with the program stakeholders to implement strategies to manage the risk factors as needed:

- A. **Delayed client response**- A large percentage of the communications between the evaluation team and stakeholders took place via email. Though agreed upon, this mode of communication created vulnerability to gaps or breakdown. Despite the client and key upstream stakeholders having demonstrated a strong commitment to timely email communication to date, delayed communication could have had a minor negative impact to the project. To mitigate risk of client response delay of more than 2-3 days when it was optimal that the client responds in the same day, the evaluation team detailed their expectations to client communication beforehand. Delays were uncommon and the team discussed deviations from expectations promptly.
- B. **Interviewee unavailability**- Lack of stakeholder participation in interview activities posed a moderate risk to the execution of the data collection strategy should their availability delay interviews beyond the desired timeframe. To mitigate this risk, the evaluation team discussed interviewee availability with the client and interviewee

supervisors before interviewees were selected. Further, the evaluation team requested that selected interviewees proactively block ahead 45 minutes in their calendar sometime the week of November 8-22, 2019. This strategy was successful.

- C. **Extended survey timeline**-The client organization and the evaluation team had a specific time frame (8 weeks) for data collection to be completed. A lack of survey response, forcing an extension to survey deadline was warranted and posed substantial risk to adherence to the project's timeframe. To mitigate this risk, the team requested that survey respondents proactively block 20 minutes on their calendar between November 4-6, 2019. Due to circumstances later discussed in the Limitations section of this paper, the survey period was extended.
- D. **Low survey response**-To enable participation in data collection activities, we recognized the importance of stakeholders being allowed to spend time during their work hours to complete surveys and interviews. With the client organization's support, this arrangement was accommodated which, in turn, mitigated risk and potentially bolstered survey response. When survey response rates fell below the desired rate listed in the organization's Standard Operating Procedure (SOP), posing minor risk to the data collection strategy, the team discussed an acceptable response threshold with the client.
- E. **No access to data**-A lack of access to extant data posed detrimental risk to the evaluation effort. To mitigate this risk, the team discussed access to and availability of data with the client at the project's outset. As a result of this proactive communication, the client shared extant data with the evaluation team. To reduce the impacts of no access to extant data not yet received, the team used a robust data collection strategy to triangulate data from other sources.
- F. **Supervisors unavailable**-The evaluation team's data collection strategy required the cooperation of supervisors to complete surveys. This moderate risk was mitigated by promoting effective internal communication between the client and supervisor participants, conveying the importance of their participation prior to the initiation of surveys. The team also expanded supervisor pool to include Director, Assistant Director, and Supervisors of Student Advisors that do not serve as student advisors or instructors.

Table A-2 summarizes the risk assessment results. Overall, it was the evaluation team's opinion that the potential cost of continuing the SAT program without having an opportunity to conduct a formative evaluation were greater than the cost of completing the evaluation project with the identified risks and additional unknown risks that were revealed during the project.

Table A-2: Risk Assessment Matrix

<b>Damage to project Likelihood</b>	<b>Minor</b>	<b>Moderate</b>	<b>Substantial</b>	<b>Detrimental</b>
<b>Unlikely</b>	-		-	(e) No access to data
<b>Maybe</b>	(a) Delayed client response (d) Low survey response	(b) Interviewees unavailable (f) Supervisors unavailable	(c) Extended survey timeline	-
<b>Likely</b>	-	-	-	-

## APPENDIX B: INSTRUMENTS AND RUBRICS

Table B-1 contains the Instruments and Rubrics Development Worksheet. Instrument and dimensional evaluation results indicated underlined text.

**Table B-1 Instruments and Rubrics**

Dimension, TIM, and IW	Data Collection Method	Instrument to Be Developed	Instrument Rubric	Dimensional Triangulation Rubric
<p><b>1. Training Graduates' Performance</b> – How well do the training graduates transfer their new learning to their role as student advisor?</p> <p>TIM: Critical Actions IW: Critical</p>	1-1. Web-based, self-administered, identifiable survey with all 2018-2019 SAT graduates (n = 100)	1-1. Structured Success Case Method (SCM) survey questionnaire and survey invitation email (see Section 2 of 1-1. WebBasedSurvey.doc, and 1-1. SurveyInvitationEmail)	<p><b>Superior:</b> <math>4.5 \leq</math> survey average <math>&lt; 5.0</math> without any Strongly Disagree or Slightly Disagree responses for the structured survey items, and mostly positive comments.</p> <p><b>Acceptable:</b> <math>4.0 \leq</math> survey average <math>&lt; 4.5</math> without any Strongly Disagree responses for the structured survey items, and a mixture of positive and negative comments, but more positive comments and/or only a few areas for improvement.</p> <p><b>Needs Improvement:</b> <math>3.0 \leq</math> survey average <math>&lt; 4.0</math> and a mixture of positive and negative comments with more negative comments and/or many areas for improvement.</p> <p><b>Not Acceptable:</b> <math>1.0 \leq</math> survey average <math>&lt; 3.0</math> and mostly negative comments.</p>	<p><b>Superior:</b> All sources indicate superior.</p> <p><b>Acceptable:</b> All sources indicate either superior or acceptable.</p> <p><b>Needs Improvement:</b> No more than one data source indicates not acceptable.</p> <p><b>Not Acceptable:</b> More than one data source indicates not acceptable.</p>
	1-2. Interview in person, via telephone, or video conference with six 2018-2019 SAT graduates. Due to time and human resource constraints, the evaluation team will	1-2. Semi-structured SCM interview instrument for SAT graduates, including an interview solicitation email message, an informed consent form, as well as interview protocol and questions. (see	<p><b>Superior:</b> Mostly positive comments.</p> <p><b>Acceptable:</b> A mixture of positive and negative comments, but more positive comments and/or only a few areas for improvement.</p> <p><b>Needs Improvement:</b> A mixture of positive and negative comments with more negative comments and/or many areas for improvement.</p>	

	interview the three top success cases and three bottom non-success cases, identified using the scoring scheme.	1- 2.EmailMSG4interview.doc, 1- 2.InformedConsentForm.doc, 1- 2.InterviewProtocol.doc , and Section 1 of 1-2. Interview questions)	<b>Not Acceptable:</b> Mostly negative comments.	
	1-3. Web-based, self-administered, anonymous survey with supervisors of SAT graduates (n = 7)	1-3. Structured survey questionnaire uploaded to a web-based survey system and survey invitation email message (see Section 1 of 1-3. WebBasedSurvey.doc, and 1-3. SurveyInvitationEmail)	<p><b>Superior:</b> <math>4.5 \leq</math> survey average <math>&lt; 5.0</math> without any Strongly Disagree or Slightly Disagree responses for the structured survey items</p> <p><b>Acceptable:</b> <math>4.0 \leq</math> survey average <math>&lt; 4.5</math> without any Strongly Disagree responses for the structured survey items</p> <p><b>Needs Improvement:</b> <math>3.0 \leq</math> survey average <math>&lt; 4.0</math></p> <p><b>Not Acceptable:</b> <math>1.0 \leq</math> survey average <math>&lt; 3.0</math></p>	
	1-4. Extant data review by evaluators of Level 1 Evaluation Report: Student Advisor and Barriers to Success (AppTrain) (n = 4)	1-4 Document review checklist (See Section 1 of 1-4 DocumentReviewCheck list)	<p><b>Superior:</b> 95% - 100% of the student comments to open-ended survey questions and responses to structured survey items indicate that student advisors are exhibiting the required critical actions and delivering the required key results.</p> <p><b>Acceptable:</b> 85% - 94% of the student comments to open-ended survey questions and responses to structured survey items indicate that student advisors are exhibiting the required critical actions and delivering the required key results.</p> <p><b>Needs Improvement:</b> 75% - 84% of the student comments to open-ended survey questions and responses to structured survey items indicate that student advisors are exhibiting the required critical actions and delivering the required key results.</p>	

			<b>Not Acceptable:</b> 0% - 74% of the student comments to open-ended survey questions and responses to structured survey items indicate that student advisors are exhibiting the required critical actions and delivering the required key results.	
<p><b>2. Course Design –</b> How well does the program employ appropriate instructional and motivational strategies to support trainee learning, confidence, and transfer?</p> <p>TIM: Resources &amp; Activities IW: Very Important</p>	<p>2-1. Web-based, self-administered, identifiable survey with all 2018-2019 SAT graduates (n = 100)</p>	<p>2-1. Instructional Design Models survey questionnaire for graduates and survey invitation email (see Section 1 of 1-1. WebBasedSurvey.doc, and 1-1. SurveyInvitationEmail)</p>	<p><b>Superior:</b> <math>4.5 \leq</math> survey average <math>&lt; 5.0</math> without any Strongly Disagree or Slightly Disagree responses for the structured survey items, and mostly positive comments.</p> <p><b>Acceptable:</b> <math>4.0 \leq</math> survey average <math>&lt; 4.5</math> without any Strongly Disagree responses for the structured survey items, and a mixture of positive and negative comments, but more positive comments and/or only a few areas for improvement.</p> <p><b>Needs Improvement:</b> <math>3.0 \leq</math> survey average <math>&lt; 4.0</math> and a mixture of positive and negative comments with more negative comments and/or many areas for improvement.</p> <p><b>Not Acceptable:</b> <math>1.0 \leq</math> survey average <math>&lt; 3.0</math> and mostly negative comments.</p>	<p><b>Superior:</b> All sources indicate superior.</p> <p><b>Acceptable:</b> All sources indicate either superior or acceptable.</p> <p><b>Needs Improvement:</b> No more than one data source indicates not acceptable.</p> <p><b>Not Acceptable:</b> More than one data source indicates not acceptable.</p>
	<p>2-2. Web-based, self-administered, anonymous survey with all 2018 - 2019 SAT instructors (n = 5)</p>	<p>2.2. Instructional Design Models survey questionnaire for SAT instructors and survey invitation email (see 2-2. WebBasedSurvey.doc, and 2-2. SurveyInvitationEmail)</p>	<p><b>Superior:</b> <math>4.5 \leq</math> survey average <math>&lt; 5.0</math> without any Strongly Disagree or Slightly Disagree responses for the structured survey items, and mostly positive comments.</p> <p><b>Acceptable:</b> <math>4.0 \leq</math> survey average <math>&lt; 4.5</math> without any Strongly Disagree responses for the structured survey items, and a mixture of positive and negative comments, but more positive comments and/or only a few areas for improvement.</p> <p><b>Needs Improvement:</b> <math>3.0 \leq</math> survey average <math>&lt; 4.0</math> and a mixture of positive and negative comments with more negative comments and/or many areas for</p>	

			improvement. <b>Not Acceptable:</b> $1.0 \leq$ survey average $< 3.0$ and mostly negative comments.	
	2-3. On-site classroom observation by one team evaluator	2-3. Existing Observation checklist (see 2-3 ObservationChecklist	<b>Superior:</b> No items marked “No-Go” and no comments for improvement. <b>Acceptable:</b> Most items marked “Go” with a few comments for improvement and no individual section received mostly “No Go.” <b>Needs Improvement:</b> Mix of “GO” and “No Go” and some individual sections receive mostly “No Go.” <b>Not Acceptable:</b> Mostly “No Go.”	
	2-4. Extant data review by evaluators of all training schedules and instructional materials.	2-4. Existing Observation checklist (see 2-3 ObservationChecklist	<b>Superior:</b> All items marked “Go” and no comments for improvement. <b>Acceptable:</b> Most items marked “Go” with a few comments for improvement and no individual section received mostly “No Go.” <b>Needs Improvement:</b> Mix of “GO” and “No Go” and some individual sections receive mostly “No Go.” <b>Not Acceptable:</b> Mostly “No Go.”	
<b>3. Post-Training Support –</b> How well are training graduates supported by environmental factors (as defined by Gilbert in the Behavior Engineering Model) in their role as student advisor after returning to the workplace?	3-1. Web-based, self-administered, identifiable survey with all 2018-2019 SAT graduates (n=100)	3-1. Behavioral Engineering Model survey questionnaire for graduates and survey invitation email (see Section 3 of 1-1. WebBasedSurvey.doc, and 1-1. SurveyInvitationEmail)	<b>Superior:</b> $4.5 \leq$ survey average $< 5.0$ without any Strongly Disagree or Slightly Disagree responses for the structured survey items, and mostly positive comments. <b>Acceptable:</b> $4.0 \leq$ survey average $< 4.5$ without any Strongly Disagree responses for the structured survey items, and a mixture of positive and negative comments, but more positive comments and/or only a few areas for improvement. <b>Needs Improvement:</b> $3.0 \leq$ survey average $< 4.0$ and a mixture of positive and negative comments with	<b>Superior:</b> All sources indicate superior. <b>Acceptable:</b> All sources indicate either superior or acceptable. <b>Needs Improvement:</b> No more than one data source indicates not acceptable.

TIM: Resources and Activities IW: Very Important			more negative comments and/or many areas for improvement. <b>Not Acceptable:</b> $1.0 \leq$ survey average $< 3.0$ and mostly negative comments.	<b>Not Acceptable:</b> More than one data source indicates not acceptable.
	3-2. Semi-structured, in-person SCM interviews with six 2018-2019 SAT graduates (n=3 success cases; n=3 non-success cases)	3-2. Semi-structured SCM interview instrument for SAT graduates, including an interview solicitation email message, an informed consent form, as well as interview protocol and questions. (see 1-2.EmailMSG4interview.doc, 1-2.InformedConsentForm.doc, 1-2.InterviewProtocol.doc, and Section 2 of 1-2. Interview questions)	<b>Superior:</b> Mostly positive comments. <b>Acceptable:</b> A mixture of positive and negative comments, but more positive comments and/or only a few areas for improvement. <b>Needs Improvement:</b> A mixture of positive and negative comments with more negative comments and/or many areas for improvement. <b>Not Acceptable:</b> Mostly negative comments.	
	3-3. Web-based, self-administered, anonymous survey with all 2018-2019 supervisors of SAT graduates (n=7)	3-3. Structured survey questionnaire uploaded to a web-based survey system and survey invitation email message (see Section 2 of 1-3. WebBasedSurvey.doc, and 1-3. SurveyInvitationEmail)	<b>Superior:</b> $4.5 \leq$ survey average $< 5.0$ without any Strongly Disagree or Slightly Disagree responses for the structured survey items <b>Acceptable:</b> $4.0 \leq$ survey average $< 4.5$ without any Strongly Disagree responses for the structured survey items <b>Needs Improvement:</b> $3.0 \leq$ survey average $< 4.0$ <b>Not Acceptable:</b> $1.0 \leq$ survey average $< 3.0$	
	3-4. Extant data review by evaluators of sources deemed applicable through	3-4 Document review checklist (See Section 2 of 1-4)	<b>Superior:</b> $3.5 \leq$ total document rating average $< 4.0$ . Most programs provide thorough support to SAT graduates serving as student advisors. Most documents provide highly detailed instructions and	

	SCM interviews (e.g., work plans, performance support tools, formal mentor/coaching programs, etc.)	DocumentReviewCheck list)	<p>procedures that fully support performance expectations set forth during SAT.</p> <p><b>Acceptable:</b> <math>3.0 \leq</math> total document rating average <math>&lt; 3.5</math>. Some programs provide some support to SAT graduates serving as student advisors. Some documents provide moderately detailed instructions and procedures that mostly support performance expectations set forth during SAT.</p> <p><b>Needs Improvement:</b> <math>2.0 \leq</math> total document rating average <math>&lt; 3.0</math>. Some programs provide little support to SAT graduates serving as student advisors. Some documents provide fairly detailed instructions and procedures that somewhat support performance expectations set forth during SAT.</p> <p><b>Not Acceptable:</b> <math>1.0 \leq</math> total document rating average <math>&lt; 2.0</math>. Most programs provide no support to SAT graduates serving as student advisors. Most documents provide no detailed instructions and procedures that support performance expectations set forth during SAT.</p>	
--	---	------------------------------	---	--

*IW*, Importance weighting; *TIM*, training impact model

## APPENDIX C: TRAINING GRADUATE SURVEY INSTRUMENT

---

1-1. *WebBasedSurvey.doc*. The survey was deployed to Training Graduates using Qualtrics to understand the Training Graduates' Performance, Course Design, and Post-Training Support dimensions. The survey was identifiable to secure known individuals, willing to participate in Success Case Method interviews. Figures C-1 Course Design Graduate Survey, C-2 On-the-Job Application Graduate Survey, and C-3 Post-Training Support Graduate Survey contains survey instruments for each dimension. Demographic and final thought questions follow.

Directions:

This survey asks for your opinion about three sections: course design, on-the-job performance, and post-training support. It should take you less than 10 minutes to complete the survey.

Your name is needed only because the evaluation team may want to follow up with some respondents. Data collected will be held in strictest confidence. Individual responses will not be shared within or outside the organization.

Start of Block: Section 1: Course Design

Section 1 **Course Design** The following questions ask about how well the course is designed to support learning, confidence, and transfer.

Please select the response that best reflects your opinion of your training experience. *If you are unsure, please select "I don't know."*

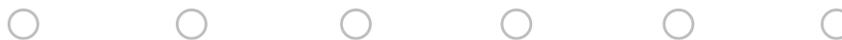
**Figure C-1 Course Design Training Graduate Survey**

Strongly disagree (1)	Slightly disagree (2)	Neutral (3)	Slightly agree (4)	Strongly agree (5)	I don't know (0)
--------------------------	--------------------------	----------------	-----------------------	-----------------------	---------------------

I was given **enough time to practice the mentoring skills** needed by a student advisor. (*e.g., team building and good decision-making*) (1)



I was given **enough time to practice counseling students** in tough situations like those faced by student advisors. (*e.g., stress, special needs, depression, conflicts, financial hardships, and academic performance*) (2)



I was given  
**enough time**  
**to practice**  
**using student**  
**advisor**  
**resources in**  
**realistic**  
**situations** like  
those faced by  
student  
advisors. (3)

**Stories** shared  
by SAT peer  
instructors  
**prepared me**  
**to deal with**  
**complex**  
**challenges**  
faced by  
student  
advisors. (4)

I felt  
**comfortable**  
**making**  
**mistakes** in  
the SAT  
classroom. (5)

I was given an opportunity to **apply my learning to increasingly complex scenarios.** (6)

**Feedback during group activities** increased my **confidence** to face realistic situations like those faced by student advisors. (7)

Start of Block: Section 2: On-the-Job Application of Learning and Results

Section 2 **On-the-Job Application of Learning and Results**

Here are some actions you may have taken in your role as Student advisor since SAT. Please select the response which best reflects your experience applying SAT.

Figure C-2 On-the-Job Application Training Graduate Survey

	Have not tried this yet (1)	Tried this, but it did not work (2)	Tried this, but have not noticed any results (3)	Tried this and achieved a concrete and worthwhile result (4)
--	-----------------------------	-------------------------------------	--	--

Used performance expectations to **model** the highest standard of professionalism. *(e.g., attitude, appearance, and conduct).* (1)



Used the 4-Bs of Communication Model to **communicate** with students. (2)



**Mentored** students on good decision-making. *(e.g., helped students foresee the consequences of a local hazard)* (3)



**Intervened** with students who demonstrated **low motivation**. (4)



Helped students **remove personal barriers** to success. (5)



**Referred** students to the appropriate resources. (6)



**Intervened** early with students exhibiting signs of **at-risk** conditions. *(e.g., stress, depression, finances, academics, substance abuse).* (7)



**Fostered** class cohesion. *(e.g. maintained strong class leadership and provided team-building opportunities)* (8)



**Utilized the SAG** to complete administrative tasks accurately. (9)



Overall impression

	<p>I cannot really use what I learned in the training. (1)</p>	<p>I already knew about and was doing the things this training taught. (2)</p>	<p>While I may have learned something new, I have not been able to use it yet (3)</p>	<p>I learned something new, used it, but have not yet achieved worthwhile results. (4)</p>	<p>I learned something new, used it, and achieved worthwhile results. (5)</p>
<p>Which statement best describes your experience since participating in the SAT program? (1)</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Start of Block: Section 3: Post-Training Support

**Section 3 Post-Training Support** The following questions ask your opinion about how well the organization has supported your application of learning on the job. Please select the option that best reflects your experience as a student advisor. *If you are unsure, please select "I don't know."*

**Figure C-3 Post-Training Support Training Graduate Survey**



	Strongly disagree (1)	Slightly disagree (2)	Neutral (3)	Slightly agree (4)	Strongly agree (5)	I don't know (0)
The Student Advisor Guide (SAG) accurately outlines the <b>procedures</b> I use on the job. (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My supervisor clearly defines <b>standards</b> for my performance. (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is an effective system in place to hold me <b>accountable</b> for meeting performance standards. ( <i>e.g., qualification plans, performance reviews, scheduled or impromptu observations, touchbase meetings</i> ) (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

My supervisor provides me with regular **feedback** on my performance. (4)

**Resources** are readily available when I need help. (*e.g., people, policies*) (5)

Processes and procedures are clearly **defined**. (6)

Processes and procedures are **efficient**. (7)

I have enough **time** to effectively carry out my duties as both a student advisor and an instructor. (8)

The **culture** of my work environment fosters exemplary performance. (9)

The **incentives** offered for meeting performance expectations are meaningful to me. (10)

**Consequences** for below-standard performance are consistently enforced. (11)

## Start of Block: Demographic Questions

### Demographics

Please provide us with some demographic information.

Again, your name is needed only because the evaluation team may want to follow up with some respondents. Data collected will be held in strictest confidence. Individual responses will not be shared within or outside the organization.

Q1 Please provide your full name: Last, First.

---

You may use this project sample for your learning purposes only. You may not copy, cite, reproduce, or distribute any content without written permission of the authors.

Q2 How many years have you been in the organization?

---

Q3 On average, how many subordinates have worked for you per tour?

---

Q4 Have you served as a student advisor?

Yes (1)

No (0)

Start of Block: Final Thoughts

Final thoughts

Please share any final thoughts you have regarding your training and post-training experience.

Q1 What aspects of the **training** have **helped you the most** in your role as student advisor?

Q2 What could have been **done better** to make the **training** more effective? Remember, your feedback is critical, especially in providing us with constructive ideas for improvement.

Q3 What aspects of the **on-the-job support** have helped you the most in your role as student advisor?

Q4 What could have been done better to make the **on-the-job support** more effective? Remember, your feedback is critical, especially in providing us with constructive ideas for improvement.

## APPENDIX D: PEER TRAINING INSTRUCTOR SURVEY INSTRUMENT

---

2-2 *WebBasedSurvey.doc*. The anonymous survey was deployed to Training Instructors using Qualtrics to measure the Course Design dimension. Figure D-1 contains the survey questions for Course Design

### Section 1

We would like your opinion about how well the course is designed to support learning, confidence, and transfer.

Please remember that course design and instructor proficiency are two separate measures; we are interested in your opinion on the course design independent of your own proficiency as an instructor.

Please select the response that best reflects your experience. *If you are unsure, please select "I Don't Know."*

**Figure D-1 Course Design Peer Instructor Survey**

	Strongly disagree (1)	Slightly disagree (2)	Neutral (3)	Slightly agree (4)	Strongly agree (5)	I don't know (0)
The timing of the lesson was sufficient. (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The lesson includes all of the "need-to-know" information (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The instructor guide provides sufficient opportunity for students to practice skills required of a student advisor. (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The instructor guide contains sufficient detail to help a new instructor teach the lesson. (4)

The Student Advisor Guide (SAG) is a comprehensive resource. (5)

Students received enough time in class to practice using the SAG. (6)

Students were given sufficient time to practice with materials that will be useful on-the-job. (e.g. SAG, online portals, Student Advisor planning tools, ALPHA policies) (7)

Students were effectively tested on the application of skills. (8)

I felt confident that students could apply their new learning on-the-job. (9)

## Section 2

Final thoughts: Please provide us with some additional information regarding your experience serving as a Peer Instructor.

Remember, your feedback is critical, especially in providing us with constructive ideas for improvement.

Q1 What aspects of the course design helped you the most in teaching the content?

Q2 What could have been done better to make the course design more effective?

You may use this project sample for your learning purposes only. You may not copy, cite, reproduce, or distribute any content without written permission of the authors.

## APPENDIX E: TRAINING GRADUATE SUPERVISOR SURVEY

1-3 *WebBasedSurvey.doc*. SAT Supervisors Training Graduates' Performance and Post-Training Support Figures E-1 On-the-Job Application Graduate Supervisor Survey and E2 Post-Training Support Graduate Supervisor Survey contains survey instruments for each dimension.

### Section 1

#### On-the-Job Performance

Directions:

Here are some actions you may have observed graduates taking in their role as Student Advisor since the SAT.

Please select the option that best reflects your experience. If you are unsure, please select "I Don't Know."

**Figure E-1 On-the-Job Performance Graduate Supervisor Survey**

	Strongly disagree (1)	Slightly disagree (2)	Neutral (3)	Slightly agree (4)	Strongly agree (5)	I don't know (0)
Student Advisors used performance expectations to model the highest standard of professionalism. (e.g., attitude, appearance, conduct) (1)	0	0	0	0	0	0
Student Advisors used the 4-B's of Communication Model to communicate with students. (e.g., Be the example, Be respectful, Be concerned, Be available) (3)	0	0	0	0	0	0
Student Advisors mentored students on good decision-making. (e.g., helped students foresee the consequences of a local hazard) (7)	0	0	0	0	0	0

Student Advisors intervened with students showing low motivation. (9)	0	0	0	0	0	0
Student Advisors helped students remove personal barriers to success. (e.g., special needs, roommate conflicts, older student issues, discussing personal issues) (10)	0	0	0	0	0	0
Student Advisors referred students to the appropriate resources. (11)	0	0	0	0	0	0
Student Advisors intervened early with at-risk students. (e.g., stress, depression, finances, academics, substance abuse) (12)	0	0	0	0	0	0
Student Advisors fostered class cohesion. (e.g. maintained strong class leadership, provided team building opportunities)(15)	0	0	0	0	0	0
Student Advisors utilized Student Advisor's Guide (SAG) to complete administrative tasks accurately. (14)	0	0	0	0	0	0

## Section 2

### Post-Training Support

Directions:

The following questions ask your opinion about how well the graduates are supported in their role as Student Advisor after returning to the workplace.

Please select the option that best reflects your experience .If you are unsure, please select "I Don't Know."

**Figure E-2 Post-Training Support Performance Graduate Supervisor Survey**

	Strongly disagree (1)	Slightly disagree (2)	Neutral (3)	Slightly agree (4)	Strongly agree (5)	I don't know (0)
Student Advisors refer to the SAG when they have questions about their duties. (1)	0	0	0	0	0	0
I give clear expectations of standards for Student Advisors' performance. (2)	0	0	0	0	0	0
There is an effective system in place to hold Student Advisors accountable for meeting performance standards. (e.g., qualification plans, performance reviews, scheduled or impromptu observations, touch base meetings)(3)	0	0	0	0	0	0
I provide regular feedback to Student Advisors on their performance. (4)	0	0	0	0	0	0
Student Advisors access resources when they need help. (e.g., people, policies)(5)	0	0	0	0	0	0
Student Advisors have clearly defined procedures to follow. (6)	0	0	0	0	0	0
Student Advisors have efficient procedures to follow. (7)	0	0	0	0	0	0
Student Advisors are given enough time to effectively carry out their duties while also serving as instructors. (8)	0	0	0	0	0	0

The culture of the Student Advisor's work environment fosters exemplary performance. (9)	o	o	o	o	o	o
Student Advisors are incentivized to meet performance expectations. (10)	o	o	o	o	o	o
Consequences for below-standard performance by Student Advisors are enforced. (11)	o	o	o	o	o	o

## APPENDIX F: SUCCESS CASE METHOD INTERVIEW PROTOCOL

---

*1-2.InterviewProtocol.doc*. The Success Case Method Interview Protocol was used to ensure informed consent was granted by participants and both ethically and systematically conduct Success Case and Non-Success Case interviews.

### Protocol

#### OPENING

Hi, my name is \_\_\_\_\_. First, thank you for agreeing to participate in this interview.

As you read in the informed consent form that you received via email, the purpose of this interview is to better understand how effective the Student Advisor Training (SAT) program has been and what needs to be changed to produce better outcomes. It will take about 30 minutes to complete the interview. Your participation is voluntary, and you can skip any questions or stop the interview at any time for any reason. Do I have your consent to conduct this interview?

Thank you. In order to protect your privacy, I would like to use a pseudonym to refer to you during the interview. May I call you [X] instead of your real name?

Thanks, [X]. I would also like to record the interview because it will be difficult for me to write down all of the information that you will share with me. I will permanently delete the audio file as soon as I finish transcribing it. Do I have permission to record this session?

OK. Before we begin our interview, do you have any questions?

Thank you. I will start recording now.

#### QUESTIONS

##### Background Questions

1. How many years have you been in the organization?
2. What is your rating (trade)?

3. On average, how many subordinates have worked for you per tour?

### **Section 1: On-the-Job Application of Learning and Results**

#### **Success Case Protocol**

##### **What was used?**

Which aspects of your training did you apply:

- Most on the job? When? How? With whom? Where?
- What evidence is there that you used this aspect of your training?
- Least on the job? Why?
- Not at all? Why?
- Which of the following student situations have you faced as a student advisor? | *Special Needs* | *Roommate conflicts* | *Depression* | *Stress* | *Academic performance* | *Financial management* | *Social adaptability* | *Personal Issues* | *Poor decision making* | *Self-disenrollment requests* | *Alcohol problems* | *Drug problems* |

Which of these situations are most common?

##### **What results were achieved?**

- What valuable outcomes were achieved as a result of your training application?
- How do you know your actions made a difference?
- How do these outcomes contribute to the organization's goals?

### **Section 2: Post-Training Supports (On-the-Job Questions)**

#### **Success Case Protocol**

##### **Directions**

Our survey showed that several people like you were able to successfully use their training to produce positive results.

##### **What contributed to your success ?**

- What differentiated you from others who were unable to make such successful use of the training?

##### **What obstacles, if any, did you encounter?**

- What solutions did you come up with to overcome these obstacles?

#### **Non-Success Case Protocol**

##### **Directions**

Our survey showed that several people were not able, for one reason or another, to do anything much with this training program. As a person who didn't get much value from this effort, what can you tell me about what went wrong? Why didn't this seem to work for you?

## What obstacles did you encounter?

### Prompts from Chevalier's Updated BEM (for both Success and Non-Success Case Interviews)

#### Environment

##### **Data**

1. How clearly defined are your **duties** as a student advisor?

##### **Prompt**

*Tell me about the Student Advisor Guide. Do you use the checklists? Procedures? Resources?*

2. After you completed the SAT, what were your supervisor's **standards** for your performance on the job?

##### **Prompts**

*Tell me about any specific targets and standards included in your qualification plans and/or performance reviews following the training.*

3. What was the system for holding you **accountable** for meeting performance standards?

##### **Prompts**

*Qualification plans, performance reviews, scheduled or impromptu observations, touch base meetings*

4. How **often** does your supervisor provide you with feedback on your performance?

##### **Prompts**

*What **kind** of feedback does your supervisor provide regarding the extent to which your performance meets standards? Is this feedback method **effective**?*

#### **Instruments**

1. Tell me about the resources that are available to help you successfully carry out your duties as a student advisor?

##### **Prompts**

*Have you used the ALPHA Student/Instructor Relationship policy to help you make decisions about what would be appropriate or inappropriate in specific situations?*

*Does your school house have a **Custom and interactive Checklist**? Or do you use the standard checklists provided in the SAG? Have you used this spreadsheet on the job? If so, how? E.g., To enter a class's convening date and graduation date so that the spreadsheet will automatically populate the dates for all of the checklist items.*

2. In what ways does the culture of your work environment foster exemplary performance?

### **Incentives**

1. Tell me about the incentives or rewards for meeting performance expectations.
2. What are the consequences for below-standard performance?

### **Person's Repertory of Behavior**

#### **Knowledge**

1. Tell me about any formal learning opportunities in which you have participated following the original SAT program.
2. Tell me about any mentoring or coaching you have received from your supervisor.

#### **Capacity**

1. What strengths do you bring to the role of student advisor?
2. What aspects of the role do you find challenging?

#### **Motives**

1. What is your biggest motivator for carrying out your duties as student advisor to the best of your ability?
2. You currently play a dual role-- that of instructor and student advisor. If you had the choice to serve only as an instructor, would you do so? Why or why not?

### **What suggestions do you have for improving the program?**

## CLOSING

Well, those are all of the questions I have for you today. I appreciate all of the information you have shared. Do you have any questions for me?

Following the interviews with you and your colleagues, the research team will be analyzing the information gathered for common themes regarding successes and challenges with applying the SAT in the role of student advisor. We will then be making recommendations to the Student Performance Department on how to promote widespread use of successful strategies as well as how to address any identified issues.

### Contact Information

If you need to contact me, you can reach out to Thomas Frazier. His contact information is in the email you received inviting your participation in this interview.

Thanks again. Have a great day!

## APPENDIX G: EXTANT DATA REVIEW CHECKLISTS

1-4 DocumentReviewChecklist.doc Section 1. Table G-1 shows the checklist instrument developed to systematically review the Level 1 Evaluation Reports titled Level 1 Evaluation Report: Student Advisor and barriers to Success (AppTrain) for FY18 Q3 through FY19 Q3. Checklist categories were developed from the TIM.

**Table G-1 Level 1 Evaluation Report Checklist**

Report	Training Director Expectations Met	Cohesive Student Teams	Student Needs Met	Error Free Admin	Professional Instructor/Student Relationships	Comments
FY 2018 Q3						
FY 2019 Q1						
FY 2019 Q3						
FY 2019 Q4						

1-4 *DocumentReviewChecklist.doc* Section 2. Table G-2 shows the checklist instrument was used to systematically review extant data collected from schoolhouses to investigate the Training Graduates' Performance dimension. Checklist categories were developed using Chevalier's (2003) Updated BEM.

**Table G-2 Schoolhouse Extant Data Checklist**

Schoolhouse	Performance Support Tools	Qualification/ Mentor Programs	Standard Operating Procedures	Comments
Trade Specialty 1				
Trade Specialty 2				
Trade Specialty 3				
Trade Specialty 4				
Trade Specialty 5				
Trade Specialty 6				
Trade Specialty 7				

*2-3 and 2-4 Observation Checklist.doc*. Section 3. Table G-3 shows the instrument was used to systematically organize a classroom observation that was made to investigate the Course Design dimension. This instrument is a pre-existing Classroom Observation Checklist.

**Table G-3 Classroom Observation Checklist**

(Table G-3 has been removed due to its proprietary information)

## APPENDIX H: DATA COLLECTION RESULTS FOR DIMENSION 1: TRAINING GRADUATES' PERFORMANCE

---

Using the survey instrument shown in [Appendix C Training Graduate Survey Instrument](#), the results of Training Graduates' response to Dimension 1: Training Graduates' On-the-Job Performance are shown in Figure H-1:

**Figure H-1 Training Graduates' On-the-Job Performance from Training Graduate Survey**  
(Figure H-1 has been removed due to its sensitive information)

Using the survey instrument found in [Appendix F Success Case Method Interview Protocol](#), the results of Success Case Method survey Dimension 1 Training Graduates' On-the-Job Performance are the following data contained in Figure H-2:

**Figure H-2 Training Graduates On-the-Job Performance from Training Graduate SCM Interviews**  
(Figure H-2 has been removed due to its sensitive information)

See [Appendix K Qualitative Codebook](#) for label descriptors.

Using the survey instrument found in [Appendix E Training Graduate Supervisor Survey](#), the results of the Training Graduate Supervisor survey for Dimension 1 Training Graduates' On-the-Job Performance are the following data contained in Figure H-3

**Figure H-3 Training Graduates On-the-Job Performance from Training Graduate Supervisor Survey**

(Figure H-3 has been removed due to its sensitive information)

Using the checklist instrument found in [Appendix G Extant Data Review Checklists](#), Level 1 Evaluation Report: Student Advisors and Barriers to Success were investigated using categories from the TIM. The results for Dimension 1 Training Graduates' On-the-Job Performance and are the following data contained in Figure H-4:

**Figure H-4 Training Graduates On-the-Job Performance from Level 1 Evaluation Reports**

(Figure H-4 has been removed due to its sensitive information)

Using the checklist instrument found in [Appendix G Extant Data Review Checklists](#), Level 1 Evaluation Report: Student Advisors and Barriers to Success were investigated to determine the most frequent issues face by AppTrain students. The results are the following data contained in Figure H-5:

**Figure H-5 Most Common Student Issues from Level 1 Evaluation Reports**

(Figure H-5 has been removed due to its sensitive information)

Adapting the same tally-style checklist (found in [Appendix G Extant Data Review Checklists](#)) as the Training Graduates' barriers to success, the Student Advisor Barriers to Success was collected during the Success Case Method interviews, the evaluation team organized the occurrences found within the data set. The results were used to analyze dimension 1 and are the following data contained in Figure H-6:

**Figure H-6 Most Common Student Issues from SCM Interviews**

(Figure H-6 has been removed due to its sensitive information)

## APPENDIX I: DATA COLLECTION RESULTS FOR DIMENSION 2: COURSE DESIGN

---

Using the survey instrument found in [Appendix C Training Graduate Survey Instrument](#), the results of Training Graduates' response to Dimension 2: Course Design are shown in Figure I-1:

**Figure I-1 Course Design from Training Graduate Survey**

(Figure I-1 has been removed due to its sensitive information)

Using the survey instrument found in [Appendix F Success Case Method Interview Protocol](#), the results of Success Case Method survey were used to investigate Dimension 2 Course Design and are the following data contained in Figure I-2:

**Figure I-2 Training Graduates On-the-Job Performance from Graduate SCM Interviews**

(Figure I-2 has been removed due to its sensitive information)

See [Appendix K Qualitative Codebook](#) for label descriptors.

Using the survey instrument found in [Appendix D Peer Training Instructor Survey Instrument](#), the results of the Peer Instructor's response to Dimension 2 Course Design are the following data contained in Figure I-3:

**Figure I-3 Training Graduates On-the-Job Performance from Peer Instructor Survey**  
(Figure I-3 has been removed due to its sensitive information)

## APPENDIX J: DATA COLLECTION RESULTS FOR DIMENSION 3: POST-TRAINING SUPPORT

---

Using the survey instrument found in [Appendix C Training Graduate Survey Instrument](#), the results of the Training Graduate's response to the Dimension 3 Post-Training Support are the following data contained in Figure J-1:

**Figure J-1 Post-Training Support from Training Graduate Survey**

(Figure J-1 has been removed due to its sensitive information)

Using the survey instrument found in [Appendix F Success Case Method Interview Protocol](#), the results of Success Case Method survey were used to investigate Dimension 3 Post-Training Support and are the following data contained in Figure J-2:

**Figure J-2 Post-Training Support from Graduate Supervisor Survey**

(Figure J-2 has been removed due to its sensitive information)

Using the survey instrument found in [Appendix E Training Graduate Supervisor Survey](#), the results of the Training Graduate Supervisor survey were used to investigate Dimension 3 Post-Training Support and are the following data contained in Figure J-3:

**Figure J-3 Post-Training Support from Graduate SCM Interviews**

(Figure J-3 has been removed due to its sensitive information)

See [Appendix K Qualitative Codebook](#) for label descriptors.

Using the checklist instrument found in [Appendix G Extant Data Review Checklists](#), a systematic review of Schoolhouse post-training support documents helped to investigate Dimension 3 Post-Training Support dimension and are the following data contained in Figure J-4:

**Figure J-4 Post-Training Support from Schoolhouse Document Review**  
(Figure J-4 has been removed due to its sensitive information)

## APPENDIX K: QUALITATIVE CODEBOOK

**Table K-1 Qualitative Code Legend**

Codes	Comments pertaining to:
<b>Course Design (CD)</b>	
CD-Instructors	Course instructors
CD-Peers	Working with peers in class
CD-Resources	Using resources in class
CD-Scenarios	Classroom scenarios
CD-Expectations	Degree to which student advisor expectations were communicated
CD-Preparations	How prepared the respondent felt
CD-Agenda	Effectiveness and adherence to course agenda
CD-Curriculum	Effectiveness of curriculum
CD-Policies	Coverage of applicable policies during class
<b>On-The-Job (OTJ)</b>	
OTJ-Mentoring	Mentoring AppTrain students
OTJ-Counseling	Counseling AppTrain students
OTJ-StudAccountability	Holding AppTrain students accountable
OTJ-GradQuality	Perceived quality of AppTrain graduates
OTJ-Stress	Stress experienced by student advisors
OTJ-Counseling	Experiences
<b>Post-Training Support (PTS)</b>	
PTS-Incentives	Programs or incentives designed to incite desired performance
PTS-Information	Feedback, qualification processes, and accountability processes
PTS-Resources	Checklists, schoolhouse processes and procedures, student management systems, and peer/community learning
PTS-Motives	Internal and external motivators
PTS-Capacity	Personal strengths/weaknesses
PTS-KnowSkills	Formal student advisor training following SAT designed to improve knowledge and skills

You may use this project sample for your learning purposes only. You may not copy, cite, reproduce, or distribute any content without written permission of the authors.