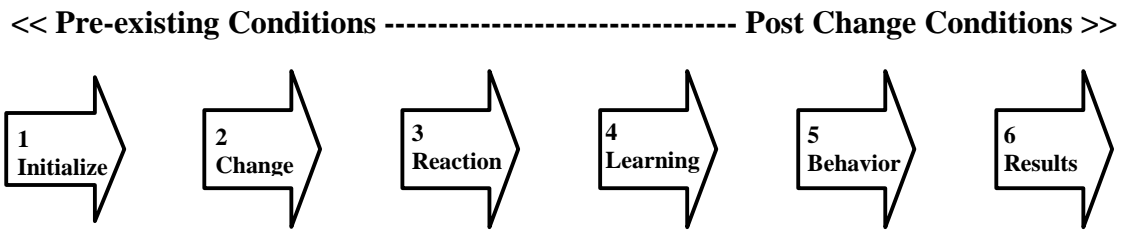


## Time-Phased Systemic Evaluation Model



Change will always happen because competition is part of the fabric of our lives. Organizations compete to either get ahead of the competition or catch up with it. Time-phased Systemic Evaluation enables decision-makers to intentionally make incremental improvements that develop or recover organizational capacity - in turn enhancing the value of competition.

Donald L. Kirkpatrick, Professor of Management at the University of Wisconsin, completed the bulk of the initial research and formulation for this Model. Although the Kirkpatrick techniques are largely sequential, the foundation of the process begins with a clear articulation of the results to be achieved so that one can determine if the process was completely successful. Once the initial overall outcomes have been solidified, it becomes easier to establish interim outcomes at each step. The following steps describe the foundation of this approach:

**1. Initialize - Current (or beginning) Organizational Results.** Normally, someone (usually someone in authority) determines that the results being achieved currently, or are projected, to fall below expectations. This determination sets in motion a chain of events resulting in some sort of change. Too often this sequence is riddled with intuitive causes and best-guess solutions based on the experience decision-makers have accumulated.

**Best Evidence:** Turnover Rates, Morale Factors,

**2. Change - Introduction of Change-based Event(s).** To solve the perceived "problem" some initiative is taken that may be as simple as a change in policy (see more on the relationship between policy and organizational culture in a separate document on "BRES"). In any event, the change is likely to have unexpected consequences if it is not thoroughly developed and systemically "tested."

**Best Evidence:** Resource Measure of ROI, Turnover, *QWLI*, etc.

**3. Reaction - Immediate Reaction.** Those directly involved in the learning environment form and document a "reaction" to the learning that occurs as a result of the change imposed. The learner, teacher/facilitator, and observers formulate opinions about the environment, receptivity of students to the materials, and the ability of the teacher/facilitator to deliver an interesting learning opportunity and fully process the implications. Reaction is often documented with evaluations and can be positive without achieving overall long-term systemic goals.

**Best Evidence:** Event Evaluations

**4. Learning - Individual and Organizational Learning.** Learning the material, learning about the teaching routine, and learning about the implications of group dynamics within the environment become critical to integrating the materials and demonstrating understanding within that environment. Then too, when the teacher/facilitator learns about the learner and the dynamics cultivated within the learning environment, the ability to enhance the learning is increased. Learning can be high without achieving overall goals.

**Best Evidence:** Examinations, Clinic Results, and Performance Feedback

**5. Behavior - Culturally Acceptable Behavior.** When learning is integrated into the fabric of behavior among those in the learning community, outside the immediate learning environment, the process has achieved an important level of success/progress. Behavior can be highly successful as a result of the learning without achieving overall goals.

**Best Evidence:** Performance Feedback, Independent Observation, Metrics

**6. Results - Organizational Results.** Before the learning was programmed one or more overall goals were established. These outcome-oriented goals and the curriculum design that followed were to achieve an overarching organizational or societal purpose. When that has been accomplished, the learning will have achieved what it was intended to achieve - increased organizational capacity through both development and recovery.

**Best Evidence:** Shifts in initializing measures

## Summary

*CapacityWare*<sup>™</sup> Technology has been developed to help determine the current status of an organization's most important resource (people and the culture they work within) before, during, and after change. The system also helps determine the nature of the change itself by calling upon proven research, and viable existing solution sets already partially implemented. Finally, the system helps maintain an accurate historical record so that trends can be analyzed to help deliver the competitive advantage needed for continuous capacity growth. With these advantages, *CapacityWare*<sup>™</sup> is fully synchronized with the needs of an organization.