

Kirkpatrick Blended Evaluation Plan®

Level 4: Results

The degree to which targeted outcomes occur as a result of the initiative and the support and accountability package

Organizational Outcome

Organization Name

Name of your organization or company, not division, department, or team.

State University

Organizational Purpose

Brief, plain language statement of what the organization does. Example: XYZ Healthcare provides healthcare services to those living in the upper half of Arizona.

State University (SU) is a public research university that educates over 30,000 students in nearly 150 programs of study.

Organization Mission Statement

Organization's mission statement, not division, department, or team mission statement.

We foster a community dedicated to equipping students with the knowledge and skills to become engaged and empowered members of society, shaping purposeful and impactful futures.

Metrics & Methods to Measure Mission Statement

Metric(s) What will be the measure of success?	Method(s) Method/tool used to obtain the data or information?
Retention and graduation rates	Enrollment, retention, and graduation data from Admissions and Institutional Research
Post-graduate career placement	University Career Center job placement reports
Tuition and fee maintenance	Admissions, Financial Aid, and University Business Office reports

Initiative Outcomes

Initiative Name

Initiative for which this plan is being created.

SU Orientation & Transition Student Staff Training Initiative

Business Case for the Initiative

A compelling statement of the importance of this initiative and/or the problem or condition that this initiative would address. Why did stakeholders request this initiative? What problem is the initiative trying to solve? The business case should not focus on the training initiative but rather the performance and strategic organizational benefits. (100 words or fewer)

While SU's student retention is high compared to the national average, approximately 400 first-year students choose to not return to the institution for their second year. There are various reasons for this, but initial survey data shows that these students feel a lack of sense of belonging compared to their peers.

Higher education research shows that there is a critical window at the beginning of every new student's transition during which social acclimation is critical. As a result, Orientation & Transition student staff members are specially poised to create an outsized impact on sense of belonging since they work with students immediately following move-in. Properly training Orientation & Transition's student staff members

will allow them to build community thoughtfully and dynamically during Orientation and Weeks of Welcome to increase sense of belonging among all first-year students.

Threats and Benefits

Statement or list of what is at risk if this initiative is not executed or is unsuccessful, and what can be gained if it is executed successfully. Start with a small threat and then gradually move to the strategic threats as seen by your stakeholders. Then do the same for the benefits but in reverse order starting with the most strategic benefit to the most tactical.

If SU's Orientation & Transition office fails to successfully equip their student leaders to respond to the needs of new students, SU risks lowering its retention rate. This has the potential to lower morale among the student body, destabilize enrollment, jeopardize tuition and fee goals, and affect perception of the institution statewide.

When Orientation & Transition student staff members effectively build community among new students, they play a vital role in strengthening and improving sense of belonging among the newest cohort of students. As a result, SU should see stronger retention from first to second year, a stronger reported sense of belonging among new students, and higher morale across the student body. All of those factors positively contribute to admissions and enrollment goals, which in turn finance the institution through tuition and fees.

Stakeholder Expectations

List of stakeholder expectations from tactical to strategic. Use the benefits you developed to create this list.

- 1. Increase new students' sense of belonging and community**
- 2. Promote stronger persistence (first to second semester) and retention (first to second year)**
- 3. Strengthen statewide perceptions of SU as an institution**
- 4. Maintain and improve enrollment numbers**
- 5. Contribute to SU's financial health as an institution via consistent tuition and fee payments**

Leading Indicators

Results and outcomes that are directly related to the initiative and support the organization's mission statement. Leading indicators are shorter-term observations and measurements suggesting that critical behaviors are on track to create an ultimately positive impact on the mission statement. Typically, the tactical benefits are internal leading indicators. Similarly, the

higher-level benefits may serve as external leading indicators. Sequence both groups in order of first occurrence to help tell a story.

Important initiatives that warrant a Blended Evaluation Plan® form need six external and six internal leading indicators.

See the Resource Library in LearnWorlds for example leading indicators.

External Leading Indicators

Customer, client, and/or industry response

1. Increased sense of belonging among first-year students

Metric(s)	Method(s)
Reported sense of belonging	Orientation survey
Reported connection with peers	Weeks of Welcome survey

2. Increased persistence and retention

Metric(s)	Method(s)
Persistence data	Fall to spring enrollment reports
Retention data	First to second year enrollment reports

3. Increased family satisfaction

Metric(s)	Method(s)
Family satisfaction feedback	Official parent Facebook page posts and comments
Number of families choosing to send multiple children to SU	Admissions and enrollment reports

4. Improved statewide perception

Metric(s)	Method(s)
Online feedback from current and potential students	External platforms (Reddit, Facebook, Instagram, etc.)
Newspaper commentary writeups	State newspaper features

5. Increased application and enrollment numbers

Metric(s)	Method(s)
Annual application numbers	Admissions data
Annual enrollment numbers	Admissions and Orientation data

6. Increased tuition revenue

Metric(s)	Method(s)
Number of students paying out-of-state tuition	Admissions and University Business Office reports
Annual revenue	Financial Aid and University Business Office reports, university budget

Internal Leading Indicators

Individual, team, department, and/or organizational outcomes

1. Increased cohesion among student staff

Metric(s)	Method(s)
Employee sense of belonging	Post-training surveys
Employee perception of team success	Mid- and post-summer interviews

2. Increased Orientation & Transition professional staff morale

Metric(s)	Method(s)
Qualitative analysis	Supervisor observations and conversations
Quantitative analysis	Employee mid-summer survey

3. Improved perception of student staff position

Metric(s)	Method(s)
Increased application numbers	Application report
Qualitative analysis	Focus group data

4. Reduced concerns about new students

Metric(s)	Method(s)
At-risk student response data	Incoming Student Skills & Attitudes Questionnaire (ISSAQ) reports
Parent and family feedback	Email and Facebook data

5. Reduced student staff accountability incidents

Metric(s)	Method(s)
Employee accountability analysis	Staff accountability tracker data
Professional staff feedback about student staff performance	Mid-summer 1:1 conversations

6. Increased retention of student staff members

Metric(s)	Method(s)
Percentage of hires retained annually	Annual employment reports
Increased institutional knowledge	Pre- and post-training tests



Interim Reporting to Stakeholders on Leading Indicators

Stakeholders' expectations regarding how they want leading indicator data provided (e.g., dashboard, written report, presentation), the frequency of the interim reports (e.g., monthly), and who is responsible for providing the interim reports.

How to Report Interim Data	Frequency of Interim Data Reports	Who is Responsible for Providing Interim Reports
Written report	Annually, with a finalized report produced the month after Weeks of Welcome concludes	Assistant Director of Transition and Director of Orientation & Transition

Level 3: Behavior

The degree to which participants apply what they learned during training when they are back on the job

Critical Behaviors

The few key behaviors that the primary group will have to consistently perform on the job to bring about targeted outcomes. Critical behaviors are:

- Specific, not broad
- Measurable and quantifiable
- Observable

Primary Group to Perform the Critical Behavior **Student Staff Members**

1. **During Weeks of Welcome, conduct community meetings with their assigned student group to develop peer-to-peer connections**

Monitoring

Metrics(s)	Methods(s)	Timing <small>Start, Frequency, Duration</small>
Attendance	Attendance tracker	Daily
Post-meeting feedback	Post-meeting survey	Daily

2. During Weeks of Welcome, perform 1:1 check-in meetings with new students who have expressed difficulty with their transition according to O&T's 1:1 guidelines

Monitoring		
Metrics(s)	Methods(s)	Timing <small>Start, Frequency, Duration</small>
Attendance	Attendance tracker	Daily
1:1 meeting reflections	Meeting minutes and written debrief	Weekly

3. During Weeks of Welcome, create a communication plan to streamline outreach following WOW for students struggling with the transition

Monitoring		
Metrics(s)	Methods(s)	Timing <small>Start, Frequency, Duration</small>
Number of communication plans created	Communication plan review by O&T professional staff	Weekly
Intentionality and quality of communication plans	Communication plan review by O&T professional staff	Weekly

Required Drivers

Support and accountability factors that reinforce, monitor, encourage, and reward performance of critical behaviors on the job

See the Resource Library in LearnWorlds for example required drivers.

Methods(s)/ Tools/ Techniques	Timing <small>Start, Frequency, Duration</small>	Relates to which Critical Behavior(s)?		
		1	2	3
Reinforcing				
Hard copy checklist with all of their required meetings and student check-ins	Available after training, daily	x	x	

Automated Teams reminders to staff members about their daily responsibilities	Daily	x	x	x
Daily huddles in the morning to refresh necessary info	Daily	x	x	x
Encouraging				
Professional staff 1:1 check-ins with student staff members who seem to be struggling	Daily	x	x	x
Presentation from successful student staff members during training about their positive experience	Weekly	x	x	x
Rewarding				
Recognition in the student staff Teams channel when someone goes above and beyond to support a struggling student	Daily	x	x	x
1:1 conversation with professional staff member to recognize positive job performance	Daily	x	x	x
Receive the weekly performance star award at morning huddle with professional staff and peers	Weekly	x	x	

Monitor & Adjust

How will you ensure that the required drivers occur? Or how will you monitor the monitoring?

Orientation & Transition professional staff members overseeing Weeks of Welcome (Assistant Director of Transition, Associate Director of Transition, Director of O&T) will review attendance logs to ensure that all necessary student meetings occur. The Assistant Director of Transition is responsible for writing, printing, and distributing hard copy checklists, as well as drafting and sending daily Teams reminders. The Weeks of Welcome professional staff team are all responsible for holding student staff members accountable.

The entire professional staff team will review student staff communication plans to ensure that they are thoughtful, intentional, and practical. The entire team will also monitor 1:1 meetings to ensure that they are completed, but it is the sole responsibility of the Assistant Director of Transition to track completion and reward positive outcomes.

Level 2: Learning

The degree to which participants acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the training

Brief Description of Training (100 words or fewer)

SU Orientation & Transition Student Staff Training Initiative is a mandatory training initiative for all student staff members prior to move-in and Weeks of Welcome. It ensures that staff members are equipped to respond to crisis, fulfill O&T responsibilities, and properly build community among new students according to office standards.

Training Duration **Four days**

Training Delivery Method (e.g., in-person, eLearning, etc.) **In-person sessions with online modules and information for reinforcement**

Learning Objectives

Statements defining what the group that will perform the critical behaviors on the job must do to perform them properly

After training, participants will be prepared to:

- 1. Conduct community meetings with their assigned student group to develop peer-to-peer connections**
- 2. Execute 1:1 coaching meetings with students struggling with their transition, according to office guidelines**
- 3. Create a communication plan to streamline outreach following WOW for students struggling with the transition**

Components of Learning

Method(s)/ Tool(s)/ Technique(s)	Timing Before, during, or after training
Knowledge “I know it.”	
Knowledge checks via Kahoot	During
Communication plan evaluation	During and after
Skills “I can do it right now.”	
Small group role play	During
Teach backs	During
Attitude “I believe this will be worthwhile to do on the job.”	
Observation and discussion	During
Post-It Note activity led by student leaders	During
Confidence “I think I can do it on the job.”	
Post-training confidence survey results	Immediately post-training
Confidence checks via Kahoot	During
Commitment “I will do it on the job.”	
Ongoing observation	Immediately post-training
Student leader reports	During and immediately post-training

Level 1: Reaction

The degree to which participants find the training favorable, engaging, and relevant to their jobs

Components of Reaction

Method(s)/ Tool(s)/ Technique(s)	Timing Before, during, or after training
Engagement The degree to which participants are actively involved in learning	
Observation	During
Communication plan evaluation	During and immediately post-training
Relevance The degree to which course content directly relates to participants' job responsibilities	
Facilitated discussions led by student leaders	During
Communication plan evaluation	During and immediately post-training
Satisfaction The degree to which participants react favorably to the learning event	
Post-training survey	Immediately post-training

Necessities for Success

Prerequisite items, events, conditions, and communications that help leverage success or address problems before they reduce the impact of an initiative

Issue Historically, student staff members have moved into their housing accommodations the morning of training, which has created a rushed and distracted environment for the first day.

Recommended Action The Assistant Director of Transition and Coordinator of Student Staff will work closely with Residence Life staff to guarantee that student staff members can move into their residence hall the day before training starts, ensuring that the first morning of transition is unhurried and focused.

Issue Student staff members do not always realize the direct impact they have on new students as they transition to SU.

Recommended Action The Assistant Director of Transition will provide student staff members with persistence, retention, and sense of belonging data during training to increase training relevancy. This will hopefully boost Level 2 Learning and increase the likelihood that staff members will apply their learning on the job.

Issue Student staff members occasionally go off-script during 1:1 coaching meetings with students who are struggling with their transition.

Recommended Action The Weeks of Welcome professional staff team will work together to create a standardized meeting guide to ensure students know how to approach each individual meeting.

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Kirkpatrick Partners, LLC, 8 Madison St., Suite C, Newnan, GA 30263
(770) 302-3500 | information@kirkpatrickpartners.com | kirkpatrickpartners.com

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