

Conceptualization of Theory-Driven Outcome Evaluation for Workplace Learning

Kyoung Phil Joo* (Korea National Open University)

■ ABSTRACT ■

In organizations, a pressing need exists for theory-driven outcome evaluation of the workplace learning practice. This conceptual study aims at exploring theoretical foundations of theory-driven outcome evaluation for workplace learning and regarding this model as an alternative for improving the accountability and validity of workplace learning interventions. The study mainly consists of two parts: 1) an overview of key facets of evaluation in workplace learning, and 2) theory-driven outcome evaluation. This article examines theory-driven outcome evaluation at the most basic level. In other words, based on a review of existing literature in this area, this article presents a model that identifies elements that most significantly influence the conceptualization of theory-driven outcome evaluation. The theory-driven outcome evaluation model provides the theoretical basis on which the workplace learning practice can be evaluated both systematically and logically.

[Key words] workplace learning, theory-driven evaluation, outcome evaluation

* Assistant Professor, Department of Youth Education, Korea National Open University, kpjoo@knou.ac.kr

I. Introduction

The workplace is increasingly accepted as a significant space for adult learning (Billett, 2007). The field of workplace learning encompasses, if not exclusively, core constituting themes such as working and learning, expertise at work, learning vocational expertise at work, a workplace curriculum model, guided learning at work, and organizing and managing workplace learning (Billett, 2001). As evaluation plays a key role in successfully accomplishing the aforementioned tasks for workplace learning (Peters & Giacumo, 2019), its importance is widely acknowledged. More and more organizations, both profitable and non-profitable, have regarded evaluation as an essential part of organizational behavior and performance.

When evaluation is considered in the workplace learning practice, it is crucial to take into account the practical role of evaluation. Determining a variety of functions and roles of evaluation in workplace learning is dependent on different learning programs, evaluation objectives, and internal and external organizational environments. Likewise, evaluation in workplace learning may appear to be “a topic of debate” (Phillips & Phillips, 2002, p. 512). The core of the debate should lie in the validity of the evaluation methods primarily used by workplace learning practitioners (Griffin, 2011a; Wang & Spitzer, 2005), and this must be based on theoretical foundations in both workplace learning and program evaluation.

The practice of the workplace learning department and/or associated departments take place in an era of increasing demands for accountability. The accountability of workplace learning indicates how well workplace learning departments and their programs contribute to organizational performance. This sometimes requires workplace learning professionals to establish specific performance goals for each of its programs, preferably with performance indicators stated in objective, quantifiable, and measurable terms (Sheppard, 2000). Consequently, an emphasis on accountability of workplace learning could be incorporated into funding guidelines for most organizations. Thus, in order for workplace learning activities to function well and get sufficiently funded in an accountability-oriented

environment, the workplace learning department must develop evaluation practices that provide the most compelling picture of the impact of training and learning programs.

In this respect, the accountability of workplace learning could be significantly reliant on the validation of evaluation methods (Alvarez, Salas, & Garofano, 2004). If an organization has a validated evaluation system and effective evaluation methods for their learning interventions, the significance and contribution of workplace learning activities could be clearly identified and extensively shared among the organization members. The most notable and prevailing model in workplace learning evaluation practice has long been the four-level model in evaluating training programs: evaluating reaction, learning, behavior, and results. This model, first proposed by Kirkpatrick in 1959, provided a practical guide for how to implement evaluation at the workplace. Afterwards, Return on Investment (ROI), defined as a tool used to evaluate the efficiency of an investment in workplace learning and organization development programs in finance and economics (Damato, 2001), was added as the fifth level by Phillips (2012) to describe financial efficiency of interventions.

Despite the aspect that ROI chiefly indicates the value of cost-effectiveness, there are unsolved challenges in regarding ROI or Return on Equity (ROE) as the best evaluation method for assuring accountability of workplace learning. First, ROI is not an evaluation system, but merely a measuring tool so that a systematic evaluation approach has been more often than not excluded when it comes to the application of ROI. Furthermore, the process of converting data to monetary values has deficits in its ambiguity and volatility. In other words, workplace learning programs might not provide immediate or articulated outcomes, and even an immediate outcome may change as time goes by. For example, the outcomes from organizational development and leadership development programs are not static but developmental. Therefore, the ROI indicators cannot fully explain such programs' outcomes but just cover a part and a certain time of outcomes by calculating monetary values. In sum, given their confined coverage, the existing evaluation models widely adopted for workplace learning have limitations in terms of program theory and logicity.

Just as researchers and practitioners in workplace learning take a rigorous approach to

the science of workplace learning, a pressing need exists for theory-driven outcome evaluation of workplace learning practice. This conceptual study aims at exploring theoretical foundations of theory-driven outcome evaluation model for workplace learning and regarding this model as an alternative for improving the accountability and validity of workplace learning interventions by means of constructing the conceptual framework. The study mainly consists of two parts: 1) an overview of key facets of evaluation in workplace learning, and 2) the theory-driven outcome evaluation model. In order to legitimately investigate and discuss the potential usefulness of the theory-driven outcome evaluation model for workplace learning activities, macro-level perspectives on evaluation theory and models have been held throughout the study, which means concrete programs and detailed evaluation approaches are far from the foci of the research.

II. Key Facets of Evaluation in Workplace Learning

With increasing frequency, workplace learning professionals are being asked to evaluate the effectiveness and impact of their efforts (Bassi, Benson, & Cheney, 1996; Bassi & Lewis, 1999; Brown & Seidner, 1998; Chelimsky, 2001; Griffin, 2011b; Phillips, 1998; van Buren & Erskine, 2002). Generally speaking, evaluation aims to deal with data for decision making, to critique actions and performance, and to plan effectively by providing methods for identifying the effects of important prior actions (Rosenberg, 1987). There are a number of reasons why it is important to undertake evaluation in workplace learning (Hargreaves & Jarvis, 2000; Rosenberg, 1987). Evaluation plays a significant part in workplace learning because it shows whether the program met the objectives, the processes of the course were satisfactory, the content is relevant, and how much participants learned (Kirkpatrick, 1959; Peters & Giacumo, 2019). Furthermore, by evaluation, workplace learning practitioners can gain the support of managers or other stakeholders (Phillips, 1998, 2012).

In workplace, objects of evaluation may vary from the learning process to learning

products, from short-term outputs to long-term outcomes, and from individual satisfaction to cost-effectiveness. Evaluation in workplace learning eventually should provide a variety of information about the value of workplace learning programs in attaining organizational goals. Without evaluation, the value of specific training efforts cannot be adequately measured (May, Moore, & Zammit, 1987), nor can the value of workplace learning investments be properly assessed (Griffin, 2011c).

The discipline of program evaluation offers fundamentals to related fields in which any evaluation, assessment, and measurement have been performed. Likewise, evaluation in workplace learning is, like other fields, based on program evaluation theory and practice. Accordingly, in order to deeply understand evaluation in workplace learning, it is advisable to review the meaning and history of program evaluation first.

Program evaluation is defined as the application of evaluation approaches, techniques, and knowledge to systematically assess and improve the planning, implementation, and effectiveness of programs (Chen, 2015). The study of program evaluation is designed and conducted to assist some audience to judge and improve the worth of programs. This definition should be widely acceptable because it agrees with definitions of evaluation that appear in most dictionaries (Stufflebeam & Webster, 1983).

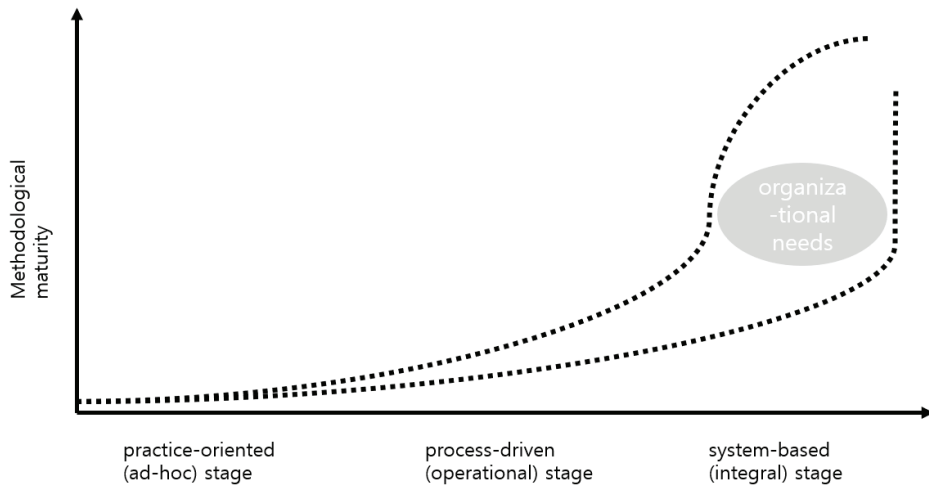
Madaus, Stufflebeam, & Scriven (1983) presented a historical overview of program evaluation in their edited book *Evaluation Models*. They classified the history of program evaluation into seven periods: 1) the age of reform 1800-1900, 2) the age of efficiency and testing 1900-1930, 3) the Tylerian age 1930-1945, 5) the age of innocence 1946-1957, 6) the age of expansion 1958-1972, and 7) the age of professionalization 1973-present. Additionally, they pointed out that program evaluation is often mistakenly viewed as a recent phenomenon and emphasized that “educators need to be aware of both contemporary and historical aspects of their emerging profession – including its philosophical underpinnings and conceptual orientations” (Madaus, Stufflebeam, & Scriven, 1983, p. 3).

Along with the development of program evaluation, workplace learning measurement and evaluation has evolved since the middle of the twenty century. Wang and Spitzer (2005)

categorized the evolution of workplace learning (or human resource development) measurement and evaluation into three stages: 1) practice-oriented atheoretical stage, 2) process-driven operational stage, and 3) research-oriented, practice-based comprehensive stage. The first stage, approximately from 1950 to 1987, features the four-level evaluation classification scheme (Kirkpatrick, 1959). The significance of this first stage lies in the fact that it is the beginning of workplace learning practitioners' unintentional and unconscious efforts to understand the measurement and evaluation of workplace learning interventions. The second stage, approximately from 1987 into the new millennium, is represented by the ROI wave (Phillips, 2012). In this stage, there were increased management demands for accountability under the circumstance of escalating global competition and increasing pressure from recurring adverse economic conditions.

The graph below describes the developmental stages of measurement and evaluation. The fact that the gap between business requirements for measurement and evaluation and the available methods and approaches has become wider with each successive stage indicates both a challenge and an opportunity to researchers and practitioners marching into the third stage (Wang, 2002). Wang and Spitzer (2005) argued that development of measurement and evaluation into stage-three maturity demand more purposeful and rigorous research and theory building. While some workplace learning practices might happen without the concrete guidance of theory in the practice-centered, beginning stage (Swanson, 1997), a theory-driven approach is indispensable to deal with recurring issues in measurement and evaluation in the workplace (Lynham, 2000). The developmental stages of evaluation in the workplace can be illustrated as in [Figure 1] below.

Several critical issues rise in association with evaluation currently discussed in workplace learning (Preskill & Russ-Eft, 2003). As the needs for those in workplace learning to show the effectiveness and importance of their efforts has been increasing (Dionne, 1996), it has become significant that workplace learning practitioners provide affluent evidence that their programs are essential to the organization's health and future prosperity. Despite the increasing demand and need for evaluation, few workplace learning practitioners actually



[Figure 1] Creation of organizational needs for evaluation
[Adpated from (Wang & Spitzer, 2005)]

conduct evaluations of workplace learning interventions (Desimone, Werner, & Harris, 2002). Even if some practitioners attempt to conduct evaluation of interventions, those that do engage in some form of evaluation activity focus predominantly on measuring learners' reactions, and rarely on determining the program effectiveness and impact. These results provide limited information for decision-making in workplace learning (van Buren & Erskine, 2002), which more often than not causes decreased outcomes of workplace learning.

III. Theory-Driven Outcome Evaluation

One way of understanding evaluation is to compare the numerous evaluation models with one another (House, 1983). Each evaluation model has distinctive features determined by its indigenous theory, and the extent to which a phenomenon is explained rests on this theory as well. For instance, if each of a theory-driven evaluation and a monitoring

evaluation model is applied to a leadership program, the possible range of explaining a phenomenon covered by each model would be different.

The idea of theory-driven outcome evaluation was introduced by several evaluation scholars. Among them, Chen (2015) integrated extensive discourses concerning theory-driven outcome evaluation and systemically organized relevant issues. The theory-driven outcome evaluation approach encompasses two concepts: theory-driven evaluation and outcome (based) evaluation. Thus, in order to understand theoretical foundations of theory-driven outcome evaluation, it would be useful to explore both evaluation models and respectively to investigate how Chen combined the concepts in these two models.

1. Theory-Driven Evaluation

Program theory designates a causal model and a logical mechanism within a program. It has been seen as an answer to why program do or do not work, how to improve the program, and what is better evidence for causal attribution (Rogers, Petrosino, Huebner, and Hacsí, 2000). The introduction and development of theory-driven evaluation activated an increased focus on understanding the mechanisms by which programs produce their effects (Davidson, 2000). This is a significant development because we can increase our confidence in a causal claim if we have some understanding of the causal mechanism involved (Sayer, 1992).

Systems theory, on the other hand, suggests other types of causal models. System thinking provides that cause and effect might be often connected not in a linear way but in a circular way through a series of virtuous circles or vicious circles (Rogers, 2000). Funnell (1997) has discussed how process feedback loops are crucial in a program model, how may affect behavior, which may then affect attitudes further through processes of self-attribution. The considerations of systems theory imply it is possible that initially small gains may ultimately become significant. In other words, it is worthwhile that evaluators consider whether the outcomes of the program are likely to decay over time or to become stronger (Rogers, 2000). This is why the system thinking can provide more reasonable explanation

about program outcomes than the ROI.

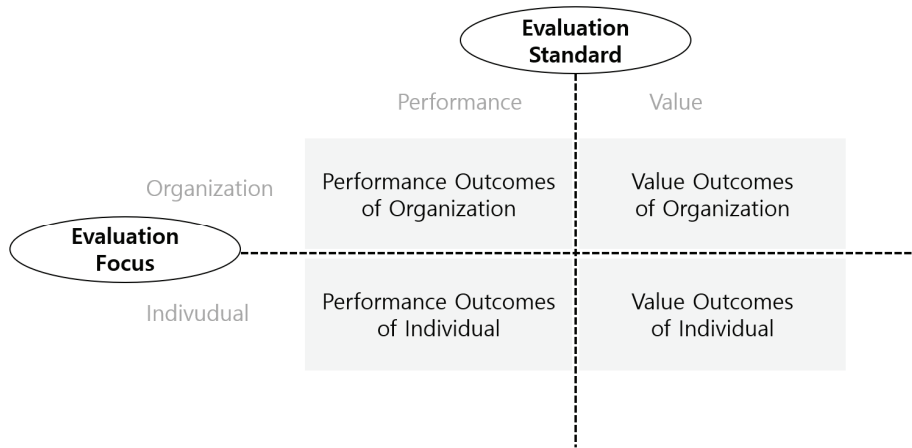
A theory-driven evaluator should dig to uncover both explicit and implicit assumptions underlying the program. Thus, for theory-driven evaluator, it is very important to find adequate theories to be involved in. Weiss (2000) suggested four criteria for selecting theories. The first criterion is the beliefs of the people associated with the program. These include the beliefs of program designers and developers, administrators, practitioners, sponsors, and clients. A second criterion is plausibility, which indicates if the program actually does the things that a theory assumes. A third criterion is lack of knowledge in the program field. That is, much effort in providing information in an attempt to change behavior should be made in order to avoid taking a theory for granted. A final criterion proposed by Weiss is the centrality of the theory to the program.

2. Outcome Evaluation

Outcome (based) evaluation encompasses the central question of what programs ought to achieve for both individual- and organization-referenced outcomes. It is more specifically defined by Schalock (2000) that outcome based evaluation is “a type of evaluation that uses person- and organization-referenced outcomes to determine current and desired person- and program-referenced outcomes and their use (program evaluation), the extent to which a program meets its goals and objectives (effective evaluation), whether a program made a difference compared to either no program or an alternative program (impact evaluation), or the equity, efficiency or effectiveness of policy outcomes (policy evaluation).”

The above figure reconceptualized from Schalock (2000) reveals how a combination of performance measurement and value assessment in outcome evaluation can be integrated in the workplace.

The model's three components include standards, focus, and outcomes. The standards reflect two perspectives on accountability: performance versus value; its focus reflects an emphasis on the organization or the individual; and its outcome denote measurable results



[Figure 2] Multiple dimentionts of evaluation in the workplace [Adapted from (Schalock, 2000)]

that are captured in a number of operationalized individual or organizational-referenced performance or value indicators.

This model can be useful in at least two aspects: it may guide and clarify the outcome evaluation process and provide a balanced approach between the person and the organization that is responsive to the expressed needs of the key players in outcome evaluation. In addition, outcome evaluation can aid “the trouble-shooting process” (Moldovan, 2016, p. 1188). For example, if employees learn their skills but do not apply them at work, the outputs of outcome evaluation can help identify concrete dimensions of performance and behavior that are likely to be implicit otherwise.

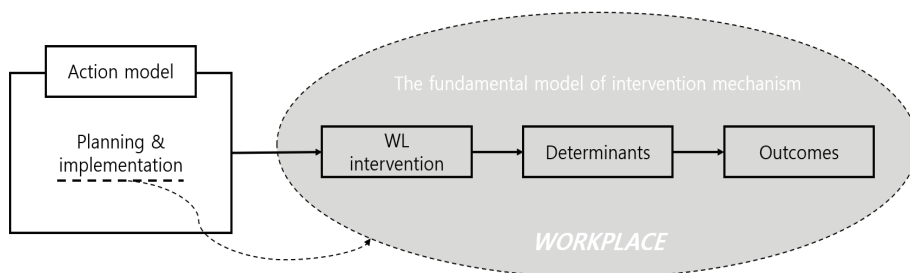
3. Theory-Driven Outcome Evaluation

Even though the outcome evaluation model will be seemingly of sufficient benefits to workplace learning practitioners, traditional outcome evaluation has focused heavily on assessing the relationship between intervention and outcome (Chen, 2015). This is, so called, a black box or input-output approach to outcome evaluation, which does not systematically evaluate transformation processes that turn interventions into outcomes. Thus,

the combination of theory-driven evaluation and outcome evaluation would meet more complicated stakeholders' needs by understanding how its transformation processes can be exploited to improve the intervention. Theory-driven outcome evaluation takes into account both underlying causal mechanism and the implementation process when assessing the effect of a program. It can provide stakeholders with understanding of whether a program is reaching its goal and document insightfully the 'hows' and 'whys' of program success or failure (Bickman, 1990; Chen, 1990; Weiss, 1997).

To delve into logical mechanism of theory-driven outcome evaluation, it is necessary to understand the fact that theory usually specifies appropriate determinants (Kohler, Grimley, & Reynolds, 1999). Agreement among stakeholders about program theory is a fundamental to developing a theory-driven outcome evaluation model. However, in many cases, disagreement between stakeholders takes place. For example, if managers disagree on which determinants mediates between the programs intervention and its outcome, the practitioner as the evaluator could gather empirical data on the relative importance of competing determinants and provide that feedback to managers.

Chen (2005) suggested three general guidelines available to evaluators designing and conducting a theory-driven outcome evaluation. The first guideline for theory-based outcome evaluation is to establish common understanding between stakeholders and evaluators of what theory-driven outcome evaluation is and what it does. A second task is to clarify stakeholders' theory, and the third step is to construct research design.



[Figure 3] Systematic elements of theory-driven outcome evaluation in the workplace
[Adapted from (Chen, 2005)]

When considering the accountability and validity of workplace learning programs, there are several significant advantages of utilizing theory-driven outcome evaluation. First, since theory-driven outcome evaluation produces information about not only whether a program is achieving its predetermined goals, which meets stakeholders' need for accountability, but also why and how a program succeeds or does not succeed, helping stakeholders understand better their programs (Chen, 2005). Eventually, theory-driven outcome evaluation has potential to contribute to finding optimized program for an organizational.

Second, by scrutinizing underlying causal mechanisms and applying pattern matching, theory-driven outcome evaluation enhances both construct and internal validity of evaluation. As mentioned in the beginning, the validity of evaluation methods has a paramount influence on explicating the accountability of workplace learning programs or interventions. That is, workplace learning practitioners can gain more validated evaluation results by theory-driven outcome evaluation.

IV. Conclusion and Implications

Organizations are taking a more systematic and methodical approach to the overall evaluation of programs and services (Phillips, 1999). As a systematic measurement of impact, the outcome evaluation concept would be employed at many intervals during and after the delivery of programs, providing short and long-term indications of a program's effectiveness (Moldovan, 2016). Outcome evaluation has been conducted for program evaluation in other fields such as museums, libraries, and higher education. In contrast, this concept has not been actively studied in and applied to workplace learning fields. Outcome evaluation is not just research, nor is it simple data collection. It helps both organization and workplace learning practitioners identify their successes and share workplace learning values with a wide range of stakeholders.

In addition, outcome evaluation does not take place in a vacuum, but is part of the core

process of organization development. Program planning, implementation, and evaluation are all parts of the whole that is driven by an organization's purpose and vision. Well-designed outcome evaluation further enables advocacy and partnership for workplace learning, and successful outcomes produced by outcome evaluation become convincing and forge the basis for ongoing investment, support and collaboration. Workplace learning practitioners might take high responsibility for developing their own set of credible indicators by outcome evaluation.

Along with the accountability and validity of workplace learning activities, further study can be proposed to practically delve into theory-driven outcome evaluation in association with the workplace learning wheel in which various roles and functions of workplace learning professionals have been identified. In addition, a number of evaluation methods should be empirically and extensively studied in workplace learning field, and methodological discussion involving all of quantitative, qualitative, and mixed methods should be encouraged in workplace learning evaluation.

Alongside the increasing significance of accountability of workplace learning, there are a number of opportunities for researchers in the area of workplace learning to advance the understanding of theory-driven outcome evaluation. The review of the relevant literature that led to the reconsideration of theory-driven outcome evaluation in the context of workplace learning suggests further research opportunities that fall into the following two overall categories:

- research related to various roles and values of theory-driven outcome evaluation in workplace learning and
- research related to the uses of outputs from the theory-driven outcome evaluation.

In researching workplace learning, it is fundamental to assure objective outcomes of evaluation based on the program theory (Chen, 2015). However, theory-driven evaluation is still a relatively new area for research and lacks a coherent theoretical foundation in the field of workplace learning. The fact that there is as yet no shared understanding of what constitutes theory-driven outcome evaluation raises the needs for further research about

how this model can be applied in numerous contexts of the workplace learning and/or human resource development practices. In-depth research methods such as case studies and action research can be adopted to further validate the theory-driven outcome evaluation model in the field. Such studies would also identify factors that motivate to use this specific evaluation model within the contexts chosen for the study.

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요약

일터학습을 위한 논리주도 성과평가 개념화 연구

주 경 필 (한국방송통신대학교)

본 연구에서는 조직 내 일터학습 관련 실천이 효과적이고 정확하게 평가되기 위해서 논리주도 성과평가의 필요성을 제기한다. 따라서 개념적 연구를 통해서 일터학습 관련 실천을 위한 논리주도 성과평가의 이론적 기초를 정립하고, 이렇게 마련된 평가모델을 일터학습 관련 실천의 책무성과 타당성을 향상시키는 대안으로 제시하는 것이 본 연구의 목적이다. 연구의 주요 내용은 크게 두 부분으로 구성되었다. 첫째는 일터학습에서 평가의 주요 요소와 특성을 살펴보는 것이고, 둘째는 논리주도 성과평가에 관한 선행연구 고찰 및 개념화이다. 여기서는 논리주도 성과평가를 가장 기초적인 수준에서 다루었다. 다시 말해, 이 분야의 선행연구 고찰을 통해서 논리주도 성과평가의 개념화에 가장 주요하게 영향을 미치는 요소를 규명하고, 그 시사점과 활용가능성 및 의의를 논의하는 것을 중심으로 연구가 수행되었다. 본 연구의 결과로 제시된 논리주도 성과평가 모델은 일터학습 관련 프로그램 운영이나 개입활동을 평가를 보다 체계적이고 논리적으로 수행하는데 기초가 될 것이다.

[주제어] 일터학습, 논리주도평가, 성과평가