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**DESIGNING AN IMPACT ASSESSMENT FRAMEWORK FOR EVALUATING  
A LEADERSHIP DEVELOPMENT PROGRAM AT AN EMPLOYEE  
EXPERIENCE FOCUSED ORGANIZATION**

**A Research Project**

**Presented to the Faculty of  
Pepperdine Graziadio Business School**

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**In Partial Fulfillment  
of the Requirements for the Degree  
Master of Science  
in  
Organizational Development**

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**by  
John Ramerman  
August 2019**

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This research project, completed by

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under the guidance of the Faculty Committee and approved by its members, has been submitted to and accepted by the faculty of Pepperdine Graziadio Business School in partial fulfillment of the requirements for the degree of

MASTER OF SCIENCE  
IN ORGANIZATIONAL DEVELOPMENT

Date: August 2019

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## Abstract

This study investigated a potential design for an impact assessment framework for evaluating a leadership development program at an employee experience focused organization. Data were collected by surveying 11 past program attendees and interviewing 8 key stakeholders of the program, including executive sponsors, program designers/facilitators, and past attendees regarding the knowledge areas, behaviors, and results to be assessed in the framework, data sources to use, and methods for evaluating results. Findings and recommendations indicated that several knowledge areas, behaviors, and results consistent with the program objectives should be evaluated. Participants advised that pre/post testing as well as ongoing monitoring are needed to detect changes and determine whether those are sustained. Moreover, participants stressed the need for 360-feedback for gauging program impacts. Based on this study, the case organization is advised to develop and test an impact assessment framework and evolve this framework in alignment with shifting organizational structures and strategies.

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## Chapter 1

### Introduction

Effective leadership has been associated with superior organizational performance, retention, engagement, and other factors critical to competitive advantage (Zeb, Ahmad, & Saeed, 2018). Strategies for enhancing leadership effectiveness have ranged from initiatives such as improving hiring practices, coaching programs, and performance improvement practices, to delivering internal and external coaching and reconfiguring rewards systems.

Of the various practices, instituting formal leadership development programs may be among the most common strategy for developing strong leaders (Reichard, Walker, Putter, Middleton, & Johnson, 2017). Accordingly, Dalakoura (2010) asserted that a vast body of research exists, which identifies leadership development as an increasingly strategic imperative for organizations. These researchers further argue that organizational survival and success within today's turbulent and highly competitive global business landscape require the development of leadership up, down, and throughout the organization (e.g., Leskiw & Singh, 2007; Tichy, 2004). For example, the rapid technological advancements, sweeping uncertainty, and intense global competition endemic to today's business landscape require leaders to make swift, effective decisions (Cummings & Worley, 2018). Contemporary organizations and their employees also expect leaders to demonstrate high levels of intrapersonal mastery, interpersonal skills, and intercultural competence (Baron, Rouleau, Grégoire, & Baron, 2018; Handa, 2018). Specific designs vary widely: Some programs occur over one or two days and are delivered by internal human resources professionals, while other programs may extend a year or more in duration and are delivered by external consultants and professionals

(Day, Fleenor, Atwater, Sturm, & McKee, 2014). Structured programs may involve lecture-based, experiential, didactic, pedagogical, or other formats. Regardless of the ways that leadership development programs are implemented, one issue that remains is how to evaluate the impact of these programs to assure they meet their objectives.

Various models exist for evaluating training programs in general (e.g., Kirkpatrick & Kirkpatrick, 2016) and leadership development programs specifically (Gentry & Martineau, 2010). This study focused on developing a valid and reliable framework for assessing the impacts of a leadership development program at one community-owned financial institution located in western New York. This organization additionally focuses on the employee experience, which concerns optimizing workers' perceptions and experiences of and with the organization, resulting in enhanced retention, engagement, innovation, and organizational agility and performance (Alshathry, Clarke, & Goodman, 2017; Plaskoff, 2018; Rasca, 2018). Maintaining this focus requires leadership that is attuned to the employee experience (Denning, 2018). In 2013, a leadership development program was created in collaboration with Ramerman Leadership Group to build the competencies needed to sustain its culture and organizational performance. Although the program appears to be successful, no systematic framework exists for assessing its impacts and determining whether its objectives are being achieved.

### **Study Purpose**

The purpose of this study was to investigate a potential design for an impact assessment framework for evaluating a leadership development program at an employee experience focused organization. An impact assessment is a type of program evaluation, and program evaluations are a form of measurement that can have many different aims

(Rossi, Lipsey, & Freeman, 2004). Besides impact assessment, other types of program evaluation include needs assessment (whether a program needed, by whom, and why); process assessment (whether the program is effectively delivered and operated); efficiency assessment (whether the program delivers a return on investment); and assessment of program theory (identifying the program's rationale and anticipated results).

Two research questions guided the design of this study:

1. What knowledge areas, behaviors, and results should be evaluated by the impact assessment framework?
2. How and when should knowledge areas, behaviors, and results be assessed for program impact?

### **Study Setting**

The setting for the present study was a local community bank located in western New York. As of 2018, the organization had a total of 556 employees and offered various financial services, including wealth management, commercial services, retail services, mortgage services, and business banking. The organization is committed to both the customer and employees and bases many of its decisions on the impact those will have on employees. Moreover, the organization considers its employee experience focus to be a competitive advantage and has built this focus into its leadership development programs.

The leadership program that is the focus of this study was delivered in 2013 (24 participants), 2014 (15 participants), and 2016 (12 participants). The program included a series of instruments, required readings, executive coaching sessions, group sessions, and other activities aimed to enhance participants' awareness of themselves and others. The instruments included:

1. A 360-degree feedback assessment completed by direct reports, peers, supervisors, and others.
2. Predictive Index: behavioral assessment to increase self-awareness and awareness of others' styles.
3. Motivation assessment: Used to help people prioritize and understand their own motivations, as well as to learn what motivates others.
4. Values assessment: Used to help clarify people's values.
5. Interpersonal self-assessment: self-reflection tool to understand attunement and self-differentiation abilities and areas for improvement.

Required readings included resources such as *Leadership and Self-Deception* by the Arbinger Institute, *Working with Emotional Intelligence* by Daniel Goleman, and additional supporting articles and materials provided by the program coaches to address participants' emergent needs. Eight sessions were conducted:

1. Kickoff session: Program launch. A 2-hour kickoff session was held where the vice president of human resources introduced and provided an overview of the program, including its purpose and goals. The entire senior executive team also attended and showed its support for the program. The consultants and program facilitators introduced themselves and an activity to teach themes of collaboration and innovation was facilitated.
2. Session 1: Relationship building. The aim of this session was to help participants begin bonding with each other, name their relationship expansion goals, and expand their awareness of themselves and others.
3. Session 2: Values. This session was designed to foster continued bonding and to encourage participants to articulate and discuss their leadership values. Exercises were facilitated to deepen participants' understanding of emotional intelligence, their predictive index styles, and the reading assignments.
4. Session 3: Empathy. The instruction, discussion, and activities in this session were designed to increase participants' understanding of and capacity for empathy.
5. Session 4: Emotional and social intelligence. In this session, participants continued building their emotional intelligence, social skills, and authentic presence through a variety of activities.
6. Session 5: Self-oriented emotional intelligence skills. During this session, participants built their capacity for self-awareness and self-regulation.

7. Session 6: Motivation. As part of this session, participants watched videos and engaged in group discussion about the factors that enhance their motivation and what they do to enhance their team members' motivation.
8. Closing session: To close the program, participants evaluated, articulated, and presented their learning and presented their findings to the senior team and to their peers.

Executive coaching was conducted throughout the program to guide participants in a process of goal setting and to help them reflect on and deepen their learnings.

At the time of this study, the organization had no formal process for evaluating the impact of their leadership development programs. Understanding the program impact will help the organization determine the value of these programs and identify what might be done differently to maximize their value. The framework created in this study may be applicable to any employee-experience focused organization in a similar industry seeking to gain competitive advantage through leadership development.

### **Significance of the Study**

A burgeoning area of research is developing regarding valid approaches for evaluating leadership development programs (Gentry & Martineau, 2010). Although there is a significant amount of literature on leadership itself (Northouse, 2012), leadership development programs do not consistently show a return; nor do they have a robust body of efficacy research associated with them (Beer, Finnström, & Schrader, 2016). The typical end-of-program evaluations used to capture participants' perceptions of the program lack rigor and fall short of addressing the long-term effects of leadership programs, especially regarding how the programs contribute to the organization's overall strategy execution and goal achievement. Leadership development specialists, human resources professionals, and organization development practitioners need to have reliable and accurate information to develop leadership curricula that have a higher likelihood of

supporting the organization's overall strategy. They also need to have practical and reliable methods for evaluating the leadership programs they implement, and to justify the large investments often spent on training. Many different individuals and groups may benefit from this study, including those at the study organization, other employee experience focused organizations, and those wanting to better understand how to design impact assessment frameworks. Findings also may add to research on impact assessment, leadership development, and leadership development within employee experienced focused organizations.

### **Organization of the Study**

This chapter outlined the background of the study, articulated the study purpose, and described the study setting. The significance of the study also was provided.

Chapter 2 offers a review of relevant literature. Theory and research about employee experience focused organizations is presented first. Specific topics include the definition of the concept, strategic advantages and disadvantages of adopting this focus, and how an optimal employee experience is created. The competencies leaders need in employee experience focused organizations also are discussed.

Next, leadership development programs are discussed, including their definition and the importance of leadership development. Design factors and their implementation are then outlined. Finally, research on impact assessments are presented. The definition and need for impact assessments are reviewed, and then specific approaches for evaluating leadership development programs in general and at employee focused organizations are outlined.

Chapter 3 describes the methods that were used in this study. Topics in this chapter include the research design, participant procedures, ethical considerations, and steps related to data collection and analysis.

Chapter 4 reports the study findings. First, the survey results are presented. Next, the interview results are outlined.

Chapter 5 offers a discussion of the findings. Specifically, conclusions related to each research question are outlined, recommendations for the study organization and organization development practitioners are offered, and limitations are acknowledged. Suggestions for continued research also are outlined.

## Chapter 2

### Literature Review

The purpose of this study was to investigate a potential design for an impact assessment framework for evaluating a leadership development program at an employee experience focused organization. This chapter reviews literature relevant to the study purpose. The following sections discuss research about employee experience focused organizations, leadership development programs, and impact assessments.

#### Employee-Experience Focused Organizations

Employee experience is defined as the employee's holistic experience with the organization. Usually this experience extends over an long period of time, from the first time the employee becomes aware of the organization (whether or not he or she is seeking employment there) and extending well beyond the end of the individual's employment contract with the organization (Plaskoff, 2018). Within this time span occur many events—most notably, the selection and hiring process, onboarding, and day-to-day work experiences in the organization. An employee's separation and alumni experiences also are significant. Alshathry et al. (2017) also referred to employee experience as *employee brand equity*. Equity can be positive or negative, depending on the nature of the employees' experiences with the organization. An employee experience focused organization is similar to a customer-focused organization, with the difference being that employees are considered customers. Hence, in such organizations, all employee touchpoints are evaluated and optimized with the intention of having a highly positive effect on employee perceptions and feelings regarding the organization.

**Strategic advantages and disadvantages.** Organizations choose to become employee experience focused for a variety of reasons. Adopting an employee experience



focus often enables employers to create and market a reputation as being an employer of choice (Alshathry et al., 2017). For example, an employee experience focus appeals to a multigenerationally and ethnically diverse workforce, as diverse individuals need different things from their employers (Plaskoff, 2018). The resulting sense of connection employees feel to their organizations can elevate employees' sense of commitment and loyalty, based on the results of a Workforce of One survey of 557 employees from midsize and large U.S. organizations (Smith & Cantrell, 2011). This research further indicated that employees often value connection over salary, and that such connection increases employees' productivity and quality of work.

Although turnover tends to be high in today's ambiguous, complex, and rapidly changing marketplace, adopting an employee experience focus can help improve the attraction, retention, engagement, and performance of top talent (Alshathry et al., 2017; Plaskoff, 2018; Rasca, 2018; Weiss et al., 2009). In turn, employees are more likely to become fully invested, engaged, and committed in the company's strategic direction. The creativity and thinking processes unleashed as a result can further benefit the organization.

The positive brand equity built through an employee focus also may help organizations better compete for resources and become the first choice for the end customer (Weiss, Tyink, & Kubiak, 2009). Employee experience focus also has been associated with higher profitability, and the process of designing the organization to be employee focused can help it become more agile and adaptable to changing market dynamics.

A primary drawback to implementing an employee focus is the investment of time, care, and resources needed to construct a consistent but realistic experience that

employees perceive as equitable for all (Smith & Cantrell, 2011). That is, satisfaction, engagement, and performance can suffer amidst perceptions of unfairness or when an overly positive external image promises an employee experience that cannot be delivered once the employee joins the organization. Additionally, the empowerment and egalitarianism that tends to exist within employee experience focused organizations can decrease the degree of control executives have, thus introducing higher risks.

**Creating an optimal employee experience.** Creating an effective employee experience requires more than simply offering perks and incentives. Instead, the process begins with facilitating positive, rewarding relationships between colleagues and supervisors wherein leaders seek to deeply understand each employee by understanding their needs, wants, and emotions through deep conversations that surface what really matters to them (Plaskoff, 2018; Rasca, 2018). Moreover, employees need to be understood not only as individuals but also through relationships and as members of different groups. Through close employee relationships, they begin to feel authentically known and cared for as real, whole people rather than as objects or resources.

Based on deep understanding of the organization's employees individually and collectively, the organization design should then be customized by placing employees at the center and incorporating their diverse attributes (Plaskoff, 2018; Rasca, 2018; Weiss et al., 2009). Specifically, deliberate attention need to be dedicated to fashioning employees' experiences, from pre-hiring through the employment period and beyond the end of their engagement (Alshathry et al., 2017).

Design factors typical to an employee-centered design include jobs that offer high autonomy, participation, and task significance and low work pressure (Rasca, 2018). The workplace cultures of employee experience focused organizations tend to be

characterized by positive, collaborative relationships between employees, high levels of supervisor-subordinate support, and strong employee-customer relationships (Alshathry et al., 2017; Rasca, 2018; Weiss et al., 2009). Programs that support employees' wellbeing, connection, and purpose are common, such as coaching, mentoring, personal development, and stress management. Reward programs tend to be tailored to specific employees (Plaskoff, 2018; Rasca, 2018), and strong corporate responsibility also tend to be evident in employee experience focused organizations. In turn, these organizations cultivate a corporate brand of taking care of its employees and its community, leading to these organizations' typically strong community connections (Alshathry et al., 2017; Rasca, 2018).

The process of redesigning and shifting the organization cannot be top-down; instead, it needs to allow for significant employee input in defining and designing their own functions (Plaskoff, 2018; Smith & Cantrell, 2011). Although this takes significant time and effort, engaging employees in the design process creates a sense of ownership, engagement, and commitment to the change.

Smith and Cantrell (2011) cited the example of Best Buy, which implemented a customizable work experience initiative and allowed employees to design their schedules, jobs, and places of work. Productivity improved by 35% and employee turnover dramatically decreased, yielding a savings of \$102,000 for every retained employee who would have otherwise left. Best Buy also has outperformed industry competitors financially since instituting its new customized policies.

**Needed leadership competencies.** Weiss et al. (2009) emphasized that in employee experience focused organizations, all leaders must live the brand. This begins at the top, as the chief executive must become a primary sponsor for talent management

and lead the charge toward becoming and remaining an employee focused organization. Supervisors must be able to clearly communicate expectations and hold employees accountable to the standard. They also must produce a supportive and inclusive environment. Rasca (2018) added that leaders need to be responsive to change, have an entrepreneurial mindset, and have a willingness to innovate. Organizations should look for exceptional, trustworthy, transparent, and inspiring leaders who can create authentic connections with employees. Good communication skills and the ability to mentor and coach employees also are crucial. Leaders must deeply desire and endeavor to understand their employees' needs and goals and then align rewards to best motivate them, yielding improved participation and engagement of all organizational stakeholders (Turner & Kalman, 2015). In addition, leaders must have an intrinsic desire to grow, along with an overall willingness to continue learning so they may be agile within the current complex and rapidly changing environment.

### **Leadership Development Programs**

Leadership development involves formal, intentional training intended to improve leaders' effectiveness and skillsets (Avolio, Avey, & Quisenberry, 2010; Solansky, 2010) consistent with the organization's and leaders' developmental needs (Golembiewski & Munzenrider, 2017; Sharlow, Langenhoff, Bhatti, Spiers, & Cummings, 2009). Day et al. (2014) further distinguished leader development from leadership development by defining *leader* development as focusing on the individual and *leadership* development as focusing on building an organization's leadership capacity.

Typical components of a leadership program include goal setting, needs assessment, mentoring, coaching, 360-degree feedback, job assignments and laboratory experiences, and action (Galli & Müller-Stewens, 2012; Scandura & Lankau, 1996).

Increasing the effectiveness of such programs often requires the inclusion of reinforcement sessions following the program. Leadership development programs are implemented for a variety of reasons. Although organizations may create leadership development programs simply because they seem like the right thing to do (Avolio et al., 2010), typical drivers include shifting market conditions that require different competencies (Golembiewski & Munzenrider, 2017; Sharlow et al., 2009; Solansky, 2010); rising costs or tightening government controls (Golembiewski & Munzenrider, 2017); intensifying market competition that threaten organizational survival (Solansky, 2010); declining retention, corporate image, or ability to attract top talent; or needing to improve the organizational climate or leadership attitudes, behaviors, and performance (Avolio et al., 2010; Golembiewski & Munzenrider, 2017; Sharlow et al., 2009; Solansky, 2010). Leadership development also can yield benefits such as improved retention, social capital, and team building or greater sense of shared purpose (Galli & Müller-Stewens, 2012).

**Design factors.** Effective programs are realistic and pragmatic and provide participants growth opportunities and new knowledge (Solansky, 2010). Kirkpatrick (1960) asserted that optimal learning occurs when participants intrinsically desire to improve, know their weakness, work in a permissive climate, are assisted by an interested and skilled individual, and have opportunities to try new ideas from the training. Gentry and Martineau (2010) explained that intrinsic motivation as well as voluntary participation are shown to be a predictor of a learner's outcomes. According to Watkins et al. (2011), 360-degree feedback, cohort network, action learning and evaluation process not only contributed to learning but was shown to be elements of the program creating the most sustainable impact. An organization can decide what constitutes an

effective leader based on needs and theory. For instance, the organization identified leadership competencies such as being more global, more innovative, more strategic thinkers, better communicators, more effective mentors and developers of people, and more reflective and proactive.

Use of leadership skills assessments can aid in revealing leaders' current areas of growth and measuring their learning and progress through the program. Ongoing evaluation and research also should be used to continually improve the program (Sharlow et al., 2009). Gathering participant feedback during design and delivery as well as after program delivery is particularly helpful for gauging program efficacy. For example, midterm participant feedback can be used to improve or redesign sessions as the program progresses.

Return on investment of the program also should be evaluated (Avolio et al., 2010). Avolio et al. (2010) suggested that when leaders understand the investment their organizations made in sending them to the program, they tend to feel more accountable and motivated to integrate learning from the intervention into their work.

Prospective participants should be screened in advance to promote program success. Desired participant characteristics include intellectual and leadership talent (Schmidt & Hunter 1998; 2000), confidence, desire to lead and perform (Colquitt, LePine, & Noe, 2000), developmental readiness for the program, receptivity to feedback, and learning orientation (Avolio et al., 2010). Although researchers disagree on the amount of experience leaders need to successfully complete leadership development programs (Bettin & Kennedy, 1990; Hirst, Mann, Bain, Pirola-Merlo, & Richter, 2004; Mumford, Marks, Connelly, Zaccaro, & Reiter-Palmon, 2000; Zacharatos, Barling, & Kelloway, 2000), the leadership experience of individual participants should be taken

into account when designing program activities. An effective leadership development program recognizes that leaders have different skill enhancement needs at different points in their career and will design accordingly to meet the population's and organization's needs.

Research indicates that self-awareness is critical to leadership development (Avolio & Gardner, 2005; Gardner, Avolio, Luthans, May, & Walumbwa, 2005). The continual exploration, understanding, and revising of a leader's self-narrative is an effective way to improve self-awareness. Incorporating self-narrative exercises such as journaling will improve a leadership development program's efficacy. Effective leadership programs should aim to incorporate experiences that improve empathy for people's suffering and develop optimistic views of others because these can significantly contribute to exceptional leader performance (Day et al., 2014).

Designing human resources processes to engender norms of learning, responsibility, and openness is a key part in supporting and encouraging leaders to develop themselves (Reichard & Johnson, 2011). Therefore, the overall organization design and climate is a key factor in the efficacy of leadership development programs. Leadership development programs created with the goal of increasing social capital in the organization should purposefully involve high-quality interactions and paying attention to contact, assimilation, and identification (Galli & Müller-Stewens, 2012).

Effective leadership development programs typically integrate feedback, and a 360-degree feedback instrument has the potential to greatly improve a leader's progress in the learning journey (Day et al., 2014). However, feedback given in isolation does not automatically translate into positive learning and behavioral outcomes in the learner.

Certain factors and processes influence efficacy, including leader reactions to the

feedback and raters' ability to provide quality feedback. In addition, a learner is more apt to yield positive results in an organization that has a supportive climate (Facteau, Facteau, Schoel, Russell, & Poteet, 1998). It is also shown that administering two 360-degree feedback assessments over an appropriate period of time is more beneficial to a leader's growth than a single assessment.

**Implementation.** Programs are implemented to meet the ongoing or acute leadership needs of an organization (Golembiewski & Munzenrider, 2017). Participants can be selected based on their perceived ability to impact those needs.

Participants in leadership development programs can come from a variety of sources, from the frontline to senior leadership. Cohorts can be multidisciplinary or based on peer groups (Sharlow et al., 2009). Participants should not only be selected based on their roles, but also on characteristics that predispose them to integrate the learning (Avolio et al., 2010), such as their leadership experience, motivation for self-development, and learning style. For example, participants who excel at learning from experiences may be better suited to learning facilitative leadership (Day et al., 2014). Individuals with a strong work orientation, mastery orientation, and career growth orientation tend to have higher self-development motivation and yield better outcomes in leadership development programs.

Curriculum, timing, delivery methods, participant demographics, and program size are all considerations for implementing a leadership program (Solansky, 2010). The program may be designed and delivered by an external consultant or by internal organizational resources (Golembiewski & Munzenrider, 2017; Sharlow et al., 2009). The program may be administered onsite, offsite, online, or using a hybrid approach.



## Impact Assessments

An impact assessment is a type of program evaluation, a measurement that can have various aims (Rossi et al., 2009). Other types of program evaluation include:

1. Needs assessment: used to determine what the focus of a program should be, its components, who it is serving, and how it should be delivered. It helps to define the scope and nature of the problem being addressed.
2. Process assessment: used to evaluate the program itself, focusing on aspects such as the delivery methods and operations. It can be used to measure if the program is meeting its intended outcomes.
3. Efficiency assessment: measures the return on the investment in the program by assessing the overall costs against the benefits. It can be used to determine whether another, more cost-effective way exists to achieve the results, or if the benefits are greater than the costs.
4. Assessment of program theory: identifies the program's rationale and anticipated results.
5. Impact assessment: determines the overall results of a program, such as whether intended outcomes were received, what the effects on recipients were, what unintended side effects occurred, and where the greatest impact occurred. An impact assessment attempts to show how much improvement was related to training (Kirkpatrick & Kirkpatrick, 1996).

Impacts may emerge over time and be gauged at various levels (e.g., individual, group, organizational; Watkins, Lysø, & de Marrais, 2011). As such, an impact assessment provides a measure of the program's overall success (Phillips, 1998).

Program sponsors use the results of an impact assessment to determine the value of the program delivered for their organization or target population.

An impact assessment can be used to determine reactions, learning, application, and business results (Phillips, 1998). Reactions concern how a leader felt about the program. Learning includes the actual knowledge, facts, and skills the participant took away from the program. Application is whether the participant plans to or is actually using the skills on the job, and may be examined in terms of work habits, work climate,

feelings, attitudes, new skills, development, communication, absenteeism, initiative, and advancement. Business results address whether the behaviors are directly delivering benefits to the organization, and may be examined through the lenses of employee morale, employee turnover, productivity, profits, operational costs, and quality.

A central challenge of impact assessments is isolating causality, given the many different factors influencing participants and the business (Phillips, 1996, 1998). Various approaches are used to overcome this challenge, such as asking participants or supervisors to estimate the degree of change or performance that can be attributed to the program. The accuracy of these estimates can be improved by averaging the feedback from both supervisors and the participants. Top management also may be asked to estimate how much the program can take credit for any observed improvements in performance.

**Impacts assessed for leadership development programs.** In addition to measuring the typical reactions, learning, behaviors, and business results outlined in the previous section, certain considerations are particularly relevant for evaluating the impacts of leadership development programs. For example, communication is a key aspect of leadership and thus should be part of any leadership development program evaluation (Phillips, 1996). Another key factor to examine is the impact of the training on the relationships between the leader and their direct reports.

Moreover, evaluations should measure the relevance and impact on the participants' performance and task functions (Gentry & Martineau, 2010). A key indicator to explore is the change in a leader and his or her teams, groups, and direct reports over time, with particular attention to determining what effects can be attributed to the program. It is additionally important to administer pre- and post-assessments that

reflect the intended program outcomes in order to determine whether the program achieved its objectives (Watkins et al., 2011).

**Impacts assessed for leadership development programs at employee experience focused organizations.** Measurement for leadership development program impacts can happen at a short-term individual level, intermediate individual level, organizational level, and system level (Gentry & Martineau, 2010). At the short-term individual level are measures of what knowledge or skills were affected by the program. The intermediate level measures behavior change over time resulting from the program. The organizational level addresses changes occurring from expanding roles of participants. The system level is about identifying changes to organizational infrastructure, such as policies and procedures that are a direct result of more effective leaders with increased skill.

Impact on leaders' learning is a key measurement (Watkins et al., 2011). For instance, this article used critical incidents to measure application in the areas of globalization, innovation, strategic thinking, and communication, all of which were focuses in the program examined for this study. More general questions also can be asked retroactively to determine whether and how the program contributed to leadership learning or capacity, and how these affected the organization. Individual measurements include skill transfer, feedback integration, job changes, and how the program created a perception of higher expectations. At an organizational level, the program's impact on culture, common language, and loyalty to the organization are measured.

**Approaches.** The specific evaluation approach taken is affected by a variety of factors, including the resources available for assessment, the evaluation expertise of the staff conducting the impact assessment, the type of training being evaluated, the support

from management for development, organization's commitment to evaluation, and the pressure to show results.

Well before the program is delivered, it is critical to plan which assessments will be administered, when they will be given, and how the results will be analyzed and used (Phillips, 1996). Doing so will allow for tracking before, during, and after the training. Control groups also may be used to further illustrate program impacts (Watkins et al., 2011). The control group should consist of randomly selected individuals who are representative of the program participants and subject to the same environmental influences, but who do not complete the program themselves.

Specific tools for assessment may include follow-up surveys (Gentry & Martineau, 2010; Kirkpatrick, 1960), knowledge tests, evaluation of learning projects completed during the program, group discussion, participant observation, customer feedback, subordinate feedback, expert assessment, and interviews with participants—whether individually or collectively, as in the case of focus groups (Phillips, 1996, 1998). For example, a questionnaire might include a critical incident section where they describe situations happening on the job, and how the training was connected to their current behaviors (Kirkpatrick & Kirkpatrick, 2016; Watkins et al., 2011). In experiential learning, a co-reflective practice wherein people discuss learning and applications can be useful for deepening and evaluating the learning.

Participants additionally may use action plans, which can provide concrete evidence of their application of learned competencies and the resulting business impacts. Similarly, performance contracts may be used to evaluate a program wherein the participant, his or her manager, and the learning consultant agree on the program outcomes. The contract then becomes a tool for tracking impacts and results.

Performance monitoring, where actual records are examined, is another way to measure impact. Selection of an evaluation method should be influenced by considerations of feasibility, accuracy, credibility, costs and time. Inclusion of multiple types and forms of assessment can improve the accuracy of the measurement.

The program evaluation can consider its impact on all stakeholders of the program, such as program participants, their superiors, subordinates, peers, and others affected by their performance (Watkins et al., 2011). Kirkpatrick (1960) advised waiting at least 3 months after the training ends so participants have time to implement the learning. Gentry and Martineau (2010) went further to advise that evaluations be done in multiple intervals, over an extended period of time—before, during, and after the program, and possibly years apart.

Once the data are gathered, statistics and trendline analyses can be used to measure variations between predicted and actual performance (Phillips, 1998). Phillips (1996) recommended setting targets for each metric being evaluated in order to determine the appropriate scope of evaluation is for each program.

### **Summary**

Examination and synthesis of the literature reveals that the demand for talent is higher than the supply. Moreover, the level of engagement in an organization is a strong indicator of success, and its ability to retain and attract top talent is a strong strategic advantage. Fostering a supportive environment marked by relationship and connection is important in contemporary workplaces. The current markets require more innovation and ability to respond to rapid shifts. Yet, the labor force is changing and diversifying in multiple ways, especially in generational makeup, and different employees need different things from their organizations. Traditional reward systems and structures are inadequate

to meet needs of this shifting workforce. Accordingly, there are major benefits to having “employer of choice” be a part of an organization’s brand.

Yet, disagreement remains in the existing literature regarding how the employee experience is implemented and to what extent. For example, questions surround how much control and autonomy are given to employees, although some level of autonomy is agreed upon. Questions also concern the degree of employee participation in design and what aspects of the employee experience should be focused on (e.g., pre-employment, employment, post-employment, personal life). Moreover, clarity is needed regarding what constitutes the key factors to focus on in the employee experience and how leaders can be developed to create organizational environments focused on optimizing the employee experience. The next chapter describes the methods that were used in this study to evaluate a leadership development program for an employee experience focused organization.

## Chapter 3

### Methods

The purpose of this study was to investigate a potential design for an impact assessment framework for evaluating a leadership development program at an employee experience focused organization. Two research questions guided the design of this study:

1. What knowledge areas, behaviors, and results should be evaluated by the framework?
2. How and when should knowledge areas, behaviors, and results be assessed for program impact?

This chapter describes the methods that were used in this study. Research design is described first. Participant procedures and ethical considerations are outlined next. The leadership development program being evaluated is then described. Finally, data collection and data analysis procedures are discussed.

### Research Design

This study used a mixed methods design, involving the collection of qualitative and quantitative data. Quantitative data allows for ease in measuring variables, thus allowing researchers to feasibly gather data from a large sample. Qualitative methods enable deep inquiry into the topic of study. Kvale (1996) has stated that qualitative approaches allow researchers to capture the complexity and nuances of human experience in its most authentic form. Research interviewing, the qualitative approach used in this study, allows probing of participants' feelings, thoughts, and experiences in great depth. Qualitative interviewing was considered appropriate for this study due to the variety of responses that was anticipated to emerge for each interview question (Creswell & Creswell, 2018).

## **Participants**

A range of viewpoints need to be gathered to design an effective evaluation framework. The study population consisted of all graduates of the study organization's leadership development program as well as two executive sponsors from the study organization and two program designers. All program graduates were invited to complete an online survey about the program (see Appendix A).

Four graduates who have moved up to senior-level leadership positions as well as two executive sponsors from the study organization and two program designers received an invitation to be interviewed (see Appendix B). The researcher followed up with a telephone call to personally invite these individuals to participate. If the candidate agreed, he or she was sent an informed consent statement (see Appendix C) and was scheduled for an interview.

## **Ethical Considerations**

All safeguards required by the Pepperdine University Institutional Review Board were implemented to protect participants. Study participation was voluntary. Participants received an informed consent statement to participate in research. Survey participants received the information as the opening screen on the survey (see Appendix D). They had to indicate "I Agree" in order to proceed to the survey. Interview participants received the consent statement in Appendix C. Participants were able to drop out at any time without penalty. Survey completion was anonymous, while interview participation was confidential. Identifying information (e.g., participant name) was not gathered to shield participants' identities and maintain their anonymity or confidentiality. The project observed all human subjects protection regulations.



## Data Collection

**Survey.** All graduates of the program were invited to complete an online 9-question survey (see Appendix D) to gather their ideas and insights about what program impacts to assess.

After gaining respondents' consent, the survey opened by reviewing the program's goals and objectives. Next, respondents were asked to provide their general impression of the program. The next four questions asked respondents to indicate the importance of evaluating specific knowledge outcomes (five items, such as "emotional and social intelligence"), behavioral outcomes (8 items, such as "enhanced relationship building"), business results (9 items, such as "improved leadership"), and talent management outcomes (8 items, such as "improved retention"). Participants indicated their responses using a five-point scale ranging from "not at all important" to "very important." Respondents also could indicate they had "no opinion." Finally, respondents were asked to indicate the year they completed the program, their gender, and their position during the program. A final question asked respondents to provide any additional insights they would like to offer regarding the leadership program or its impacts.

The survey took respondents, on average, 8 minutes to complete. The survey was open for 1 week. Two reminder emails were sent to all graduates every 3 days until the survey closed.

**Interviews.** Semi-structured interviews were conducted in person or by telephone, depending upon the participant's preference. Each interview lasted 27-77 minutes. Handwritten notes were taken during each interview. A 25-item semi-structured interview script (see Appendix E) was used to guide the research conversations. The script was created for this research and piloted with two individuals (one leadership

development program graduate, one leadership development program designer) external to the study organization.

Each interview opened with three warm-up questions to gather participants' general impressions of the leadership program. Next, three open-ended questions were asked to solicit participants' views about who should be involved in assessing the impacts of one organization's Leadership Agility Program (LAP), what impacts should be measured, and what forms and types of data should be gathered as part of that of evaluation.

Next, a proposed evaluation framework was presented with knowledge, behaviors, and results to assess. For each, proposed metrics were identified. Participants were asked to indicate which three of the proposed metrics in each area they would consider most important to evaluate. Participants also were asked about the process, time frame, and methods for assessing these metrics. Each interview closed with two final open-ended questions to solicit any additional insights participants wished to express.

### **Data Analysis Procedures**

Survey data were tabulated and frequency distributions for each assessed outcome was reported. Open-ended survey data and interview data underwent content analysis as described by Creswell and Creswell (2018). The following steps were taken:

1. All interview notes were read to ascertain the general meaning and ideas conveyed in the interviews.
2. Each response was reviewed question by question to identify the main ideas and apply a theme to each.
3. Data were reorganized based on the themes that were identified.
4. The number of participants reporting each theme was calculated when the analysis was finished.

5. A second coder reviewed the analysis to gauge its accuracy. The analysis was revised until the researcher and second coder agreed on the results.

## Chapter 4

### Results

The purpose of this study was to investigate a potential design for an impact assessment framework for evaluating a leadership development program at an employee experience focused organization. Two research questions guided the design of this study:

1. What knowledge areas, behaviors, and results should be evaluated by the framework?
2. How and when should knowledge areas, behaviors, and results be assessed for program impact?

This chapter describes the results. Survey results are presented first, followed by a report of the qualitative results.

#### Survey Results

All 44 past program participants were asked to complete a survey to evaluate the LAP. Multiple email requests and attempts to encourage participation were issued. A total of 11 participants completed a survey, for a 25% response rate. Of the respondents, the majority (58.3%) completed the program in 2016, with the remaining respondents equally split across the 2013 and 2014 cohorts (see Table 1). Two thirds (66.7%) of the respondents were female.

**Table 1**

***Survey Participant Demographics***

	n	%
Year Program Completed		
2013	2	16.7%
2014	2	16.7%
2016	7	58.3%
Gender		
Female	8	66.7%
Male	3	25.0%
No response	1	8.3%

*N* = 11

Survey respondents were asked to indicate the importance of evaluating how well participants acquired the knowledge areas taught (see Table 2). Respondents were offered a rating scale from 1 (not at all important) to 5 (very important), in addition to the option of indicating “no opinion,” although none of the areas were rated as “not at all important” or only “slightly important.” This same rating scale was used throughout the survey. Of all the knowledge areas, the respondents most strongly endorsed interpersonal skills: 10 (83.3%) reported it as very important, and the remaining 2 (16.7%) reported it as quite important. The next two most strongly endorsed knowledge areas were emotional and social intelligence (10 [83.3%] rating it very important, 1 [8.3%] rating it quite important), and self-awareness (9 [75%] rating it very important).

**Table 2**

***Importance of Measuring Knowledge Areas Taught***

	Important	Quite important	Very Important
Interpersonal skills	0%	n = 2, 16.7%	n = 10, 83.3%
Emotional and social intelligence	n = 1, 8.3%	n = 1, 8.3%	n = 10, 83.3%
Self-awareness	0%	n = 3, 25.0%	n = 9, 75.0%
Motivating employees	n = 1, 8.3%	n = 4, 33.3%	n = 7, 58.3%
Predictive Index Communication styles*	n = 2, 16.7%	n = 3, 25.0%	n = 6, 50.0%

*N* = 12; Rating scale: 1 (not at all important) to 5 (very important); Participants did not rate any topics as not at all important or slightly important; \* The Predictive Index Communication styles assessment gathers 360-degree data to measure the program participant’s leadership and communication style; one participant reported having no opinion

Survey respondents were asked to indicate the importance of measuring the effectiveness of LAP for cultivating certain behaviors (see Table 3). Of all the behaviors, the respondents most strongly endorsed enhancing relationships and making actions that are congruent with organizational values: for both, 91.7% reported them as very important, and the remaining 8.3% reported it as quite important. The next three most strongly endorsed behaviors were cross-functional collaboration, increasing clarity and

credibility, and improving self-confidence and self-efficacy (for all three: 83.3% rating it very important, 16.7% rating it quite important). Although increasing motivation of direct reports and meeting personal development plans were not as highly endorsed, 75% of participants still rated it as very important. Although executive presence was the least favored for measurement, all participants indicated it was quite important or very important.

**Table 3**

***Importance of Measuring Participant Behaviors Cultivated***

	Important	Quite important	Very Important
Enhancing relationships	0%	8.3%	91.7%
Making actions that are congruent with organizational values	0%	8.3%	91.7%
Cross-functional collaboration	0%	16.7%	83.3%
Increasing clarity and credibility	0%	16.7%	83.3%
Improving self-confidence and self-efficacy	0%	16.7%	83.3%
Increasing motivation of direct reports	0%	25.0%	75.0%
Executive presence	0%	58.3%	41.7%
Meeting personal development plans	8.3%	16.7%	75.0%

*N* = 12; Rating scale: 1 (not at all important) to 5 (very important); Participants did not rate any topics as not at all important or slightly important

Survey respondents were asked to indicate the importance of measuring the effectiveness of LAP for helping participants achieve business results (see Table 4).

Improved leadership performance was the most highly endorsed business result, with all 12 participants rating it as very important. The next two most highly recommend business result was improved interpersonal skill levels (11 [91.7%] rating it very important, 1 [8.3%] rating it quite important) and more productive business critical conversations (10 [83.3%] rating it very important, and 1 [8.3%] rating it quite important). Additionally, nine participants (75%) rated both increased innovation and ideation and increased productivity as very important. The least endorsed business results were structural,

policy, work process, and reward changes (five [41.7%] rating it very important) and new lines of business created (six [25%] rating it very important).

**Table 4**

***Importance of Measuring Participant Business Results Achieved***

	Slightly important	Important	Quite important	Very Important
Improved leadership performance	0%	0%	0.0%	n = 12, 100.0%
Improved interpersonal skill levels	0%	0%	n = 1, 8.3%	n = 11, 91.7%
More productive business critical conversations	0%	0%	n = 2, 16.7%	n = 10, 83.3%
Increased innovation and ideation	0%	0%	n = 3, 25.0%	n = 9, 75.0%
Increased productivity	0%	0%	n = 3, 25.0%	n = 9, 75.0%
Improved succession planning	0%	0%	41.7%	58.3%
More individual coaching and group development occurring	0%	0%	n = 6, 50.0%	n = 6, 50.0%
Structural, policy, work process, and reward changes*	n = 1, 8.3%	n = 3, 25.0%	n = 2, 16.7%	n = 5, 41.7%
New lines of business created*	0%	n = 4, 33.3%	n = 4, 33.3%	n = 3, 25.0%

*N* = 12; Rating scale: 1 (not at all important) to 5 (very important); Participants did not rate any topics as not at all important; \*One participant reported having no opinion

Survey respondents were asked to indicate the importance of measuring the effectiveness of LAP on helping participants achieve talent management results (see Table 5). Engagement was the most highly endorsed, with all 12 participants rating it as very important. Improved morale was the second most highly endorsed (11 [91.7%] rating it very important, and 8.3% rating it quite important) and improved retention was third (10 [83.3%] rating it very important, and 2 [16.7%] rating it important). Improved team scores and increased bench strength were also highly endorsed, with nine participants (75%) naming them as very important. Increased revenue was the least

endorsed by participants (seven [58.3%] rating it very important, and five [41.7%] rating it quite important).

**Table 5**

***Importance of Measuring Participant Talent Management Results Achieved***

	Important	Quite important	Very Important
Engagement	0.0%	0.0%	n = 12, 100.0%
Improved morale	0.0%	n = 1, 8.3%	n = 11, 91.7%
Improved retention	n = 2, 16.7%	0.0%	n = 10, 83.3%
Improved team scores	n = 1, 8.3%	n = 2, 16.7%	n = 9, 75.0%
Increased bench strength	0.0%	n = 3, 25.0%	n = 9, 75.0%
Improved 360-degree review results*	0.0%	n = 3, 25.0%	n = 8, 66.7%
Improved performance review scores	n = 1, 8.3%	n = 3, 25.0%	n = 8, 66.7%
Increased revenue	0.0%	n = 5, 41.7%	n = 7, 58.3%

*N* = 12; Rating scale: 1 (not at all important) to 5 (very important); Participants did not rate any topics as not at all important or slightly important; \*one participant reported having no opinion

The survey results were analyzed using independent samples t-tests and analyses of variances to determine whether respondents' answers varied by gender or program completion. Only two significant differences were found (see Table 6). Participants from the 2014 cohort rated the importance of learning about Predictive Index Communication styles, referring to a 360-degree measurement of participant's leadership and communication styles, as less important than program participants from other cohorts:  $F(2,8) = 11.273, p < .01$ . Participants from the 2014 cohort rated improving 360-degree review results as less important than did program participants from other cohorts. These results require further investigation, as the small sample size means the test has very low statistical power.



**Table 6*****Significant Differences***

Area	2013 (n = 2)	2014 (n = 2)	2016 (N = 7)	ANOVA	Sig. Diff
Predictive Index Communication styles (Topic)*	5.00 (0.00)	3.00 (0.00)	4.57 (.54)	F(2,8) = 11.273, p < .01	2014 < 2013, 2014 < 2016
Improved 360-degree review results (Talent Management Result)	4.50 (.71)	4.00 (0.00)	5.00 (0.00) N = 6	F(2,7) = 11.200, p < .01	2014 < 2016

N = 12; Rating scale: 1 (not at all important) to 5 (very important); \* the Predictive Index Communication styles assessment gathers 360-degree data to measure the program participant's leadership and communication style

**Interview Results**

To begin the interview, participants were asked to provide their general impression of the LAP. Seven of the eight participants stated that all organizational stakeholders of the program had a favorable impression. For example, one designer/executive sponsor stated, "I've seen a number of individuals who were attendees speak positively about their experience with specific stories of transformation and change and applying leadership principles that they have learned." One attendee stated, "I enjoyed it. It was a very enlightening."

Two participants additionally noted that all organizational stakeholders were highly engaged in the program. One designer/sponsor said, "It was experienced with a great deal of enthusiasm by the attendees." An attendee also stated, "It was the right time for me, when I knew it was important in my day to day work life."

Next, participants were asked to describe the ways in which the LAP was successful (see Table 7). Five of the eight participants expressed that the LAP developed specific skills in trainees, such as emotional intelligence, public speaking, communication, difficult conversations, and self-confidence. For instance, one participant

said, “There was a notable improvement across all of those people with being able to hold difficult conversations.” Additionally, a sponsor/designer stated, “In terms of management and leadership challenges that come up during the normal course of business, I have seen a lot of growth and development.”

**Table 7**

*Successful Aspects of the Leadership Agility Program*

Successful Aspect	n
Develops specific skills	5
Expands participants' cross-organizational networks and builds broader operational understanding	4
Builds self-awareness and emotional and social intelligence	4
Participants experience psychological safety and feel supported	3
Participants advance to higher-level positions	2

*N* = 8

Four participants emphasized that, through the program, attendees expanded their cross-organizational networks and built broader operational understanding. For example, a sponsor/designer stated that it allowed “a group of attendees to get to know each other and understand how their roles may relate.” An attendee expressed that the program facilitated “cross-functional access to a lot of coworkers that you might not always have direct interactions with.”

Four additional participants stated that attendees built their self-awareness and emotional and social intelligence. For example, sponsor/designer stated, “So that's what I've seen so far. Increased self-understanding and interpersonal competence.” An attendee also said the Predictive “Index produced substantial awareness of self, others, why we interact well (or not), and how to interact better.”

Next, participants were asked to describe the ways in which the LAP could be more successful (see Table 8). Seven of the eight participants expressed that the LAP needed more program time or follow-up coaching and experiences to support learning

and change. For example, one sponsor/designer stated, “it would be more successful if there were additional follow-up experiences to reinforce the learnings and behavioral changes.” One attendee indicated, “I wanted more time. I wanted a longer program.” A sponsor/designer stated:

It would be helpful to have some kind of follow up after the program is finished, whatever that could look like—whether it was additional coaching a year later or an alumni group that gets together to continue that learning, or mentoring with someone who's gone through it.

**Table 8**

***Leadership Agility Program Areas for Improvement***

Area for Improvement	n
Need more program time or follow-up coaching and experiences to support learning and change	7
Measure the degree of participants' change	3
Screen participants to assure readiness for program	2

*N* = 8

Three participants mentioned that the program measuring the degree of participants' change would improve the program. For example, a sponsor/designer stated, “To assess the program, could've done even more in terms of the project and business results . . . only thing that it was missing any assessment design of the program.” Another sponsor/designer said “what is the level of refresher necessary... But what are the indicators that refreshers necessary?”

Two participants mentioned that the program should include a screening process to assure readiness for the program. For example, one attendee stated, “I don't think that they could self-assess” when referring to a couple of participants who didn't seem to show significant growth. Another attendee suggested “screening to assemble a class that will help each other.”

Participants were asked to offer their initial ideas for evaluating the LAP (see Table 9). Regarding impacts to assess, the most commonly noted impact (n = 6) was organizational results, such as customer satisfaction, engagement, retention, succession planning and leadership transitions, change agility, morale, communication, improved financial bottom line, and belief in leadership. For example, one sponsor/designer stated, “I think one measurement is how stable and fluid are the transitions.” Another sponsor/designer stated, “customer satisfaction, engagement and retention.” An attendee offered “succession plan: is there a succession plan in place and are people available.”

Four participants additionally noted that changes in leadership behavior should be assessed, particularly as it concerned attendees’ EI, social intelligence, communication and listening, problem solving, having difficult conversations, collaboration, public speaking, self-awareness, relationship building, morale, and organizational commitment. For example, a sponsor/designer suggested, “assess behaviors that that we keep tabs on. core areas related to emotional intelligence, such as communication skills, problem solving, listening, having courage to have difficult conversations.” An attendee added, “Collaboration is one of the biggest pieces, [followed by] public speaking [and]] exercising emotional and social intelligence.”

**Table 9**

***Initial Ideas for Evaluating Leadership Agility Program***

Impacts to Assess	n
Organizational results	6
Leadership behavior changes	4
Knowledge	2
Attendees’ reactions to program	1

Participants were presented with various knowledge areas, behaviors, business results, and talent management results and asked to pick three from each category to

evaluate (see Table 10). The top three rated knowledge areas were emotional and social intelligence and self-awareness, cited by seven participants each. The Predictive Index Communication styles assessment, which gathers 360-degree data to measure the program participant's leadership and communication styles, was noted by four participants.

**Table 10**

***Participant Ratings of Impacts to Assess***

	Aspect	n
Knowledge	Emotional and social intelligence	7
	Self-awareness	7
	Predictive Index communication styles	4
	Interpersonal skills	3
	Motivating employees	1
Behaviors	Cross-functional collaboration	7
	Enhance relationships	6
	Increase clarity and credibility	4
	Improved self-confidence and self-efficacy	3
	Personal development plan fulfillment	2
	Actions congruent with organization values	2
	Increasing motivation of direct reports	0
	Executive presence	0
Business Results	Improved leadership performance	7
	Improved succession planning	7
	More productive business critical conversations	5
	Improved interpersonal skill levels	2
	Increased innovation and ideation	2
	Increased productivity	1
	More individual coaching and group development occurring	0
	New lines of business created	0
	Structural, policy, work process, and reward changes	0
Talent Management Results	Increased bench strength	8
	Engagement	5
	Improved retention	4
	Improved 360-degree review results	4
	Improved morale	3
	Improved performance review scores	1
	Improved team scores	0
Increased revenue	0	

*N* = 8; the Predictive Index Communication styles assessment gathers 360-degree data to measure the program participant's leadership and communication style

The top-rated behaviors were cross-functional collaboration (n = 7), enhance relationships (n = 6), and increase clarity and credibility (n = 4). Top-rated business results included improved leadership performance and improved succession planning, each cited by seven participants, and more productive business critical conversations (n = 5). The top three rated talent management results were increased bench strength, cited by all participants, and engagement (n = 5) and improved retention (n = 4)

When asked to provide rationale for their impact selection, all participants indicated that they selected items that would act as building blocks of other outcomes (see Table 11). For example, one sponsor/designer stated, “Because I think the self-awareness, actually is what drives all the others.” Also, an attendee stated, “I think I selected interpersonal skill levels because it encompasses, each of those individual components that made up the program.”

**Table 11**

***Participant Rationale for Impact Selection***

Rationale	n
Selected items that act as building blocks of other outcomes	8
Selected items that help solve core organizational problems	7
Selected items that were a focus or achievement of the program	6
Selected personally valuable knowledge areas	2

N = 8

Additionally, seven out of the eight participants offered that their selected themes would help solve core organizational problems. For example, a sponsor/designer stated, “The core foundational things for us is to look at our bench strength, figure out where we have gaps and find ways to develop those gaps.” Another attendee stated, “If we're not looking at the customer through all of our lines of business that we're missing out on tons of opportunity.”

Six of the eight participants selected items that were a focus or achievement of the program. For example, an attendee stated, “One of the intentions from the start of the program was that it was a response to the silo.” A sponsor/designer stated, “bench strength was definitely a key goal of the program.”

When asked to comment on the timing of evaluation, six of the eight participants noted the need for pre and post testing, while five participants added that ongoing periodic evaluations were needed to track progress (see Table 12). In an example of the pre and post testing, a sponsor/designer stated that “getting a pre and post 360 would be very helpful to see that there is progress and observed behaviors that are congruent with the goals of the program.” In another instance of the pre and post testing, an attendee stated that “you could do a pre- and post-test or survey, before the program and after the program.” In an example of periodic ongoing evaluation, an attendee stated, “After creating an initial dashboard, evaluate monthly or another interval over time.” Additionally, a sponsor/designer stated, “Succession planning conversation that we do formally on an annual basis.”

**Table 12**

*General Proposed Timing for Evaluation*

General timing	n
Pre/post testing	6
In-program evaluation	2
Periodic ongoing evaluation	5

$N = 8$

Participants also were asked to comment on the appropriate timing of evaluation for each type of impact (see Table 13). In general, participants expected behavior changes to emerge rather early, beginning approximately 3 months after the start of the program,

whereas business and talent management results were anticipated later, beginning immediately after the program and often taking years to be fully realized.

**Table 13**

***Proposed Impact-Specific Evaluation Timing***

Timing	Behavior*	Business Results	Talent Management Results
Beginning of program (1-3 months)	1	1	0
Mid-program (3-6 months)	5	2	1
Immediately after the program (6-12 months)	5	4	2
One year or longer	3	6	6

\*one participant noted that others may not acknowledge attendees' behavior change until it is sustained for some time

The majority of participants indicated that behavior changes should occur during or immediately after the program. When asked when the behaviors should be expected, five of the eight participants stated they should occur both mid-program (3-6 months) and immediately after the program (6-12 months). One sponsor/designer stated, "I expect behaviors to occur to begin occurring in significant ways [mid-program,] between 3 and 6 months from the outset of the program." Similarly, an attendee stated, "In the majority, you would see probably some small steady growth throughout the program." Others anticipated changes later, such as this attendee who explained, "30 to 45 days from conclusion. . . . If you're not going to put it into place right away, then you're not going to do it ever." Another attendee stated, "You would maybe see a noticeable change from the baseline to measurements done at 6 months or a year."

Participants believed it would take longer to see business results—1 year or longer, according to six of the eight participants. One attendee asserted, "The succession plan could be one to three years," while a sponsor/designer predicted, "They should be able to start seeing effects within, a year to 18 months." Half the participants indicated



business results could be expected immediately after the program, such as this attendee, who anticipated “changes or increased innovation may [take] 6 to 9 months.”

Six of the eight participants also believed that talent management results would take 1 year or longer to emerge. For example, a sponsor/designer said that “a longer period of time, like 3 years, would be needed for bench strength to be seen,” while another sponsor/designer asserted, “I think, honestly, it's found in 18 months.”

Regarding who should be involved in the process, all eight participants stressed the need for holistic evaluation that included the attendees’ supervisors, peers, and subordinates (see Table 14). One attendee stated that trainees should be “evaluated by their subordinates, peers, and supervisors.” A sponsor/designer stated, “You would do everybody you're interacting with: peers, direct reports and superiors.”

**Table 14**

*Proposed Evaluators of Impacts*

Evaluator	n
Attendees’ supervisors, peers, and subordinates	8
Attendees	7
Executive sponsors	5
Human resources	5
Facilitators and coaches	2

*N* = 8

Seven participants believed that the attendees themselves should offer self-report of the impact on the program. Other recommended evaluators included executive sponsors and human resources, cited by five participants each. For example, a sponsor/designer stated:

The CEO’s and senior management’s buy-in for a program is critical to success. The executive team of the organization needs to be actively engaged too. . . . They help select who might participate in the program. I think that’s key so everybody has a common language and understands the purpose of the program.

Another sponsor/designer stated, “the bench rates could be done with the senior leadership, because it was to the mid and connect to the senior levels, I think that the president of the organization CEO should be involved.”

Participants suggested a range of data sources to use in evaluating program impacts (see Table 15). All eight advised using the findings of the organization’s self-report and 360-degree feedback tool. One sponsor/designer elaborated, “The 360 would be extremely valuable because you'd have the peers to assess the cross functional work, observing their effectiveness.”

All participants also recommended observing the attendees. For instance, a sponsor/designer stated, “observe performance and provide anecdotes. Just day-to-day observation.” Another sponsor/designer advised monitoring “the attendee in different situations and observe those behaviors and actions or inaction.” An attendee suggested, “Notice how did they interact. . . . Are they really connecting in those types of situations?”

**Table 15**

*Recommended Data Sources*

Data Source	n
360-degree feedback tool	8
Observations of attendee (All impacts)	8
Company reports and statistics (business, talent management result impacts)	6
Testing and assessments (general, behavior impacts)	4
Interviews (All impacts)	4
Performance reviews (All impacts)	2
Applied projects (general, behavior impacts)	1

*N* = 8

Six participants recommended using company reports and statistics—particularly for evaluating the impacts on business and talent management results. One sponsor/designer suggested, “It may be captured in key performance indicators, like the

efficiency ratio, return on assets, return on equity.” Another sponsor/designer explained, “I would look at retention rates in general.” An attendee specified he would examine, “retention ... and then results, results, results, results, results. I mean that's pretty easy to see what our bottom line or revenue numbers are. Improved performance review scores, that's all HR driven.” A final theme, although cited by only one participant, was evaluating attendees based on their applications of learned knowledge and behaviors.

### **Summary**

This chapter presented the results of study based on 11 completed surveys of past attendees and 8 interviews with program stakeholders. The next chapter provides a discussion of the results.

## Chapter 5

### Discussion

The purpose of this study was to investigate a potential design for an impact assessment framework for evaluating a leadership development program at an employee experience focused organization. Two research questions guided the design of this study:

1. What knowledge areas, behaviors, and results should be evaluated by the framework?
2. How and when should knowledge areas, behaviors, and results be assessed for program impact?

This chapter describes the results. Survey results are presented first, followed by a report of the qualitative results. Conclusions related to each research question are outlined, recommendations for the study organization and for organization development practitioners are offered, and limitations are acknowledged. Suggestions for continued research also are outlined.

### Conclusions

**Knowledge areas, behaviors, and results to assess.** Based on the study data, participants recommended evaluating the knowledge, behavioral, and result-oriented impacts that were (a) foundational to other outcomes, (b) instrumental in solving core organizational problems, or (c) a central focus of the leadership development program. All the proposed knowledge areas, behaviors, and business and talent management results were considered important by participants across the survey and interview participants.

Further examination of the results indicated that top-rated knowledge areas to evaluate included emotional and social intelligence, interpersonal skills, and self-awareness. Top-rated behaviors across the survey and interviewees included enhancing relationships, cross-functional collaboration, and increasing clarity and credibility. Top-

rated business results across the survey and interview participants included improved leadership performance, improved interpersonal skill levels, and productive business critical conversations. Notably, although improved succession planning was noted as a key outcome in the interviews, survey participants rated it as having lower importance. This could be the result of having included program sponsors in the interview but not in the survey, as program sponsors were aware that succession planning was a goal for the program and had more visibility of the extent to which that goal had been achieved. Top-rated talent management results across the surveys and interviews included engagement and improved retention. Interviewees were unanimous in selecting increased bench strength as a key talent management result to assess. In contrast, improved team scores was a top-four rated outcome on the survey, whereas no interviewees selected this as a key outcome. This again could be indicative of the inclusion of program sponsors and more senior-level participants in the interview compared to the survey sample. In this case, the program participants, generally being at a lower level in the organization than program sponsors, likely would be more focused, involved, and aware of day-to-day team operations and how that was affected by participation in the program.

Across the findings, a core theme is the importance of cultivating leaders' emotional and social intelligence, which is related to self-awareness and enables productive communication, enhanced relationships, and cross-functional collaboration. These outcomes, in turn, help produce other valued organizational outcomes. The past attendees who were interviewed emphasized the profound impact the program had on them in these areas and how having completed the program forged a sense of rapport and camaraderie with other past attendees, even if they were not in the same cohort. The

foundational focus on building awareness of self and others is consistent with leadership development literature (Day et al., 2014).

The focus on social, emotional, and relational skills in this study is reflective of employee experience focused organizations, as discussed by Alshathry et al. (2017) and Rasca (2018), and developing these skills and competencies was a primary objective of the leadership development program examined in this study. At the same time, the high value the study organization places on soft skills such as emotional and social intelligence is unique relative to the financial industry, which is noted for its high levels of competition between employees, general lack of value placed on such competencies, and focus on task- and results-oriented leader competencies (Deloitte, 2013). Given this, it is important to be aware that the impact assessment framework designed for this leadership development program and this organization may have limited transferability to other organizations in the financial industry unless they desire to move toward an employee experience focus as part of their strategic intent. Moreover, given the importance participants placed on selecting impacts that are instrumental to solving core organizational problems, it follows that the program design and impact assessment should be evaluated on an ongoing basis to assure alignment with organizational needs and objectives.

**Methods for evaluation.** In general, participants believed that a baseline measurements of trainees' knowledge, skills, and results should be taken before they begin the program. These same measures should then be applied at the end of the program to determine any changes. These findings are consistent with Gentry and Martineau (2010), who similarly emphasized the need to measure changes over the

course of a training program. Some participants also noted that observations could occur during the program to monitor attendees' level of knowledge and skill development.

Additionally, participants stressed that periodic ongoing evaluation is needed to gauge sustained change and other program effects. Participants indicated that behavioral changes tend to emerge earlier—generally beginning as early as 3 months after the program start, whereas business and talent management results may take years to be fully realized. Similarly, several past authors asserted that behavior change can take substantial time to emerge (Day et al., 2014; Gentry & Martineau, 2010; Kirkpatrick, 1960). Moreover, as one participant pointed out, even when behavior change is made, it can take observers additional time to notice and trust the change, consistent with Goldsmith (2014).

A focus in the findings was the need for 360-degree evaluations using input from the attendees as well as their supervisors, peers, and subordinates. Assessment by executive sponsors and human resources also were identified as potential evaluators, particularly as it pertained to bench strength, succession planning, and higher-level talent management results. This is consistent with several authors, who heavily stressed the importance of self- and 360-degree assessments when gauging the impacts of a training intervention (Day et al., 2014; Solansky, 2010; Watkins et al., 2011).

The study organization already has in place a 360-degree feedback tool, which participants believed could be useful for pre- and post-testing. Direct observation and gathering anecdotal evidence also were identified as critical sources of data, consistent with Phillips (1996, 1998) and Solansky (2010). As one participant noted, evaluation needs to be grounded in specific, real-life examples. Other tools already in place within the organization, such as culture surveys, retention statistics, and similar indicators

additionally can be leveraged for use in evaluating the program. At the same time, particularly concerning business and talent management results, it may be difficult to isolate the impact of the program on these results, as retention and other broad indicators are influenced by a wide variety of factors.

It also is important to be clear about the tools, data sources, evaluators, and timing for measurement when the framework is developed. Any limitations to attributing the effects to the program also should be acknowledged in the framework. Finally, attendees should be informed about the measurement frameworks and timing of their administration, as knowing that measurements and accountability are built into the program may increase their likelihood of learning and changing.

**Unanticipated findings.** This study led to several unanticipated findings. One of these concerned the importance of making the leadership development program voluntary, noted by two of the eight interviewees and earlier asserted by Gentry and Martineau (2010) and Sharlow et al. (2009). The voluntary nature of the program contributes to attendees' favorable reactions and engagement, in turn, influencing the validity of the assessment framework and its results. Accordingly, it is important to assess attendees' reactions and attitudes toward the program to gauge their sense of value and level of engagement and enjoyment of the program, as these influence the later impacts being assessed as part of this framework. Similarly, Kirkpatrick (1960) stressed the importance of gauging participants' reactions early in the program.

A second finding that was not deliberately examined in this research, but which emerged in the findings concerned the critical role that psychological safety and trust in the cohort and the program played in facilitating and supporting the leadership development outcomes. Three of the four past program participants who were



interviewed described these factors as playing a central role in their ability to deeply engage in the learning and grow as leaders and individuals. Thus, although these do not constitute knowledge areas, behaviors, or results, they are precipitating conditions that need to be present in the program for the other outcomes to emerge. Therefore, it is important to assess participants' perceptions of the level of psychological safety early and periodically throughout the program.

A third unanticipated finding was the need to screen potential attendees for their suitability for the program, as this too can influence the validity of any impact assessment. That is, if the attendees are not willing or able to engage in the development work in the manner needed, they are unlikely to achieve the intended results. Yet, this lack of achievement, in this case, is not necessarily the result of any program failures but instead the result of a poor fit of the attendee with the program. Moreover, an attendees' lack of fit can adversely affect the learning climate and other attendees' abilities to engage in the program and achieve the desired results. For example, for the program examined in this study, attendees needed a certain level of willingness to deepen their self-awareness and engage in self-disclosure and relationship building. Two of the four past program participants interviewed in this study mentioned a few of their fellow attendees who did not have this willingness. The risk is that the unwilling attendees' actions and inactions then affect the climate of the program, reducing the level of psychological safety and trust in the group, in turn, risking the program objectives. For this reason, it is important for leadership development programs to develop screening tools and procedures to assure that participants enter the program when—and not before—they are ready. Several past researchers similarly noted that participants should be carefully selected based on their profiles, characteristics, and abilities to integrate the

learning (Avolio et al., 2010; Day et al., 2014; Golembiewski & Munzenrider, 2017; Solankysy, 2010).

## Recommendations

Recommendations for the study organization as well as organization development practitioners who are support an employee experience organization are as follows:

1. Develop an impact assessment framework specific to the needs of the organization being examined. The results of this study indicated several factors to evaluate for this leadership development program along with methods for doing so. Although it is important to adapt the framework as needed to reflect the organization and leader development program being assessed, this study's findings can serve as a helpful starting point for creating a bespoke framework assessment, thus saving time, versus beginning with Kirkpatrick's basic four-level framework (Kirkpatrick & Kirkpatrick, 2016). The framework should outline at each measurement point what is being measured, who should be involved in the measurement, what data will be used to conduct the measurement, and how these data will be collected. The framework may be a highly complex and detailed procedural manual for evaluation or a simple listing of key points when assessing impact, depending upon the needs for the evaluation and the preferences of the program stakeholders. When determining the level of complexity of the evaluation, organizational stakeholders should consider the amount of flexibility needed in evaluation and the potential for shifting organizational objectives, as both would require evaluators to use discretion and potentially stray from the procedure when conducting an evaluation.
2. Test the applicability of the impact assessment framework proposed in this study within the organization. Once an impact assessment framework is developed, it is important to test it to see whether it yields the desired evaluation. This could be accomplished by selecting a few test cases: those who exceeded all expectations in the program, those who met expectations and constitute typical cases, and those who did not meet expectations. The impact assessment framework could be tested on these individuals to confirm that the framework (a) is understandable and relatively easy to use, (b) produces valuable data, and (c) rather reliably yields an accurate assessment of the individuals.
3. Be aware that evolving organizational objectives and strategies may require different sets of knowledge, behaviors, and results than what may have been required in the past. In this study, program sponsors/designers noted that the organization's objectives have changed since the program was last administered. As a result, the proposed program impacts were of less value and urgency to them. This indicates that even the proposed framework should

be critically considered in light of current organizational needs and directives before it is applied within the study organization.

### **Limitations**

Several limitations affected this study. First, data collection occurred at a time when the research organization was undergoing significant change and the research participants were under a substantial amount of stress. For instance, the researcher was told through those interviewed as well as others in the organization, that it was challenging to prioritize and complete projects because of an increased workload. It is possible that the increased workload negatively impacted the quality and quantity of responses to the survey. Future studies could reduce this limitation by working with the study organization to ensuring that timing of data collection was conducive to gathering the highest quality and quantity of responses.

Another limitation that affected the study was inadequate validation of the data collection procedures. Specifically, the interview script was not piloted with past participants of the leadership agility program. Because the starting questions began with reflection on a program, it may have prompted some past attendees to focus much of their answers on their personal experience rather than on the intended broader impacts. Future studies could reduce this limitation by piloting the interview script with a portion of the specific study population and revise the questions as needed.

A third limitation is that the study was performed 3 years after the last cohort finished the program, and 6 years after the program's original inception. Failure to conduct this study sooner may have resulted in answers tied to or influenced by the organization's current needs and strategic priorities, which have shifted since the program was first run in 2013. Future studies could reduce this limitation by collecting data prior

to the launch of the leadership development program, or between iterations of the program. It could also have focused on creating an impact assessment for a future leadership development program that was more relevant to the organization's current needs.

A fourth limitation is the unbalanced distribution of survey participants, with the majority being from the 2016 cohort. That is, the importance facilitators placed on the knowledge, behaviors, and results in each cohort may have been different and, thus, differentially influenced the perceived importance of these competencies across cohorts. It would have been helpful to draw a sample balanced across the three cohorts to yield more representative results. Without that, it is difficult to determine whether the results of this study unduly reflect circumstances specific to the 2016 cohort, or if they apply equally to all cohorts. Future studies may reduce this limitation by timing the study when more participants are available and by allowing for a longer survey completion window.

Additionally, this research was a case study, meaning that the findings lack generalizability to other organizations, especially because they were based on a leadership program customized for the research organization. Future studies could expand the design to a multiple case study or use another research design if more transferable or generalizable results are desired.

A final limitation is the small sample size. Although all 44 past program participants still employed by the organization were invited to complete a survey, only 11 did so, yielding a 25% response rate. Moreover, only eight interviews were conducted (two program designers/facilitators, two executive sponsors, four past participants). Therefore, the findings are not representative of all program participants.

### **Suggestions for Additional Research**

The study conclusions, recommendations, and limitations lead to several suggestions for continued research. One suggestion is to further explore the various factors that affect leaders' reactions to the program, their acquisition of knowledge, and their achievement of business and talent management results. These insights are needed to better understand and isolate the effects unique to the program. Although it can be challenging to attribute direct causality of impacts to a leadership development program, gathering additional relevant data would at least allow for a more comprehensive analysis. This exploration would begin with research on what external factors are shown to have the most significant influence on the impacts to be measured. Interviews with a cross-section of stakeholders representing different areas of the organization also could be conducted to investigate what they perceive to have the most influence on the impacts to be measured, using the prior research results as a loosely structured guide for the conversation.

Another suggestion for research is to explore the relationship between the organization's design and strategy in relation to the desired impacts of the leadership development program, especially given the organization's objectives to be employee experience focused. That is, nothing happens in a silo, and the extent to which the organization's strategy and design supports or inhibits the intended goals of the program should be explored. This is needed to understand how the organization may need to function differently to maximize and support any impacts related to enhancing the employee experience. It is also needed to understand what other factors are contributing to the achievement (or lack thereof) of the employee experience impacts measured.

Galbraith's star model of design could be used as a model to explore the different aspects

of the organization that contribute to the impacts deemed important to measure. Specifically, the research could involve a series of interviews with two sets of people: (a) a cross-section of participants representative of the whole organization and (b) selected individuals who may be best able to provide valuable insights about the program, as indicated by their ability or knowledge. A series of questions should be tailored to inquire about the aspects of the star model (strategy, structure, human resources management, reward systems, business processes/lateral links) and how they support, inhibit, or fail to influence the employee experience impacts identified.

### **Summary**

This study investigated a potential design for an impact assessment framework for evaluating a leadership development program at an employee experience focused organization. Two research questions were examined: (a) What knowledge areas, behaviors, and results should be evaluated by framework? (b) How and when should knowledge areas, behaviors, and results be assessed for program impact? Data were collected by surveying 11 past program attendees and interviewing 8 key stakeholders of the program, including executive sponsors, program designers/facilitators, and past attendees. Frequency distributions were calculated for survey data and interviews were content analyzed to identify themes related to knowledge areas, behaviors, and results to be assessed in the framework; data sources to use; and methods for evaluating results. Findings and recommendations indicated that several knowledge areas, behaviors, and results consistent with the program objectives should be evaluated. Participants advised that pre/post testing as well as ongoing monitoring are needed to detect changes and determine whether those are sustained. Moreover, participants stressed the need for 360-degree feedback for gauging program impacts. Based on this study, the case organization

is advised to develop and test an impact assessment framework and evolve this framework in alignment with shifting organizational structures and strategies.

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## Appendix A: Survey Invitation

Hello \_\_\_\_\_:

I am conducting research intended to design an evaluation process for gauging the impacts of the Leadership Agility Program (LAP) at [your organization]. You are receiving this email because you were a participant of the program.

This study is part of my master's in organizational development at Pepperdine University and is being conducted in collaboration with [executive sponsor], who has reviewed and approved [your organization]'s participation in the study and recommended I contact you.

I am writing to request your participation in this study. Participation will involve completing a 5- to 10-minute online survey regarding your ideas and feedback on how we might best evaluate the impacts of the LAP.

Participation is voluntary and anonymous. You would not be identified in the study and any answers you provide would be pooled with others' responses and reported in aggregate.

If you would like to complete the survey, you may do so at: [link to online survey]

I sincerely thank you for your help!

John Ramerman

## Appendix B: Interview Invitation

Hello \_\_\_\_\_:

I am conducting research intended to design an evaluation process for gauging the impacts of the Agile Leadership program at [your organization]. This study is part of my master's in organizational development at Pepperdine University and is being conducted in collaboration with [organization liaison's name], who has reviewed and approved [your organization]'s participation in the study and recommended I contact you.

I am writing to request your participation in this study. Participation will involve one 1-hour, in-person or telephone conversation with me to discuss your ideas and solicit your feedback on how we might best evaluate the impacts of the leadership development program. The conversation would be scheduled at a time and location convenient for you.

Participation is voluntary and confidential. You would not be identified in the study and any answers you provide would be pooled with others' responses and reported in aggregate.

Would you please let me know if you are willing to participate in my study?

I sincerely thank you for your help!

John Ramerman

## Appendix C: Informed Consent Statement—Interviews

### PEPPERDINE UNIVERSITY

Graziadio School of Business and Management

#### INFORMED CONSENT FOR PARTICIPATION IN RESEARCH ACTIVITIES

#### DESIGNING AN IMPACT ASSESSMENT FRAMEWORK FOR EVALUATING A LEADERSHIP DEVELOPMENT PROGRAM AT AN EMPLOYEE EXPERIENCE FOCUSED ORGANIZATION

You are invited to participate in a research study conducted by John Ramerman, MS candidate, and Terri Egan, PhD, at Pepperdine University, because you are a sponsor, designer, or participant of [your organization]'s Leadership Agility Program (LAP). Your participation is voluntary. You should read the information below, and ask questions about anything that you do not understand, before deciding whether to participate. Please take as much time as you need to read the consent form. You may also decide to discuss participation with your family or friends. You will also be given a copy of this form for your records.

#### PURPOSE OF THE STUDY

The purpose of this study was to design a framework for evaluating a leadership development program at [your organization].

#### STUDY PROCEDURES

If you volunteer to participate in this study, you will be asked to take part in a 1-hour, in-person or telephone interview to discuss your ideas and solicit your feedback on how we might best evaluate the impacts of the leadership development program.

#### POTENTIAL RISKS AND DISCOMFORTS

The potential but highly unlikely risk associated with participation in this study include possible emotional discomfort as you think about your experiences related to [your organization]'s Leadership Agility Program (LAP).

#### POTENTIAL BENEFITS TO PARTICIPANTS AND/OR TO SOCIETY

While there are no direct benefits to the study participants, there are several anticipated benefits to society, which may include guiding future research or creating services to help evaluate leadership development programs. The results of the program also may help improve future iterations of [your organization]'s Leadership Agility Program (LAP),

### **CONFIDENTIALITY**

The records collected for this study will be confidential as far as permitted by law. However, if required to do so by law, it may be necessary to disclose information collected about you. Examples of the types of issues that would require me to break confidentiality are if disclosed any instances of child abuse and elder abuse. Pepperdine's University's Human Subjects Protection Program (HSPP) may also access the data collected. The HSPP occasionally reviews and monitors research studies to protect the rights and welfare of research subjects.

The researcher will record your answers in a password-protected document and a unique identifier (such as "Participant 1") will be assigned to your information. Any information you share that could uniquely identify you (such names, places, or events unique to you) will be given a fake name and anonymized during the interview process.

The data will be stored on a password protected computer in the researcher's residence for three years after the study has been completed and then destroyed.

### **SUSPECTED NEGLECT OR ABUSE OF CHILDREN**

Under California law, the researcher(s) who may also be a mandated reporter will not maintain as confidential, information about known or reasonably suspected incidents of abuse or neglect of a child, dependent adult or elder, including, but not limited to, physical, sexual, emotional, and financial abuse or neglect. If any researcher has or is given such information, he or she is required to report this abuse to the proper authorities.

### **PARTICIPATION AND WITHDRAWAL**

Your participation is voluntary. Your refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of your participation in this research study.

### **ALTERNATIVES TO FULL PARTICIPATION**

The alternative to participation in the study is not participating or only completing the items for which you feel comfortable.

### **INVESTIGATOR'S CONTACT INFORMATION**

You understand that the investigator is willing to answer any inquiries you may have concerning the research herein described. You understand that you may contact John Ramerman at [contact information], or Terri Egan at [contact information] if you have any other questions or concerns about this research.

### **RIGHTS OF RESEARCH PARTICIPANT – IRB CONTACT INFORMATION**

If you have questions, concerns or complaints about your rights as a research participant or research in general please contact Dr. Judy Ho, Chairperson of the Graduate & Professional Schools Institutional Review Board at Pepperdine University [contact information].

## Appendix D: Participant Survey

### PEPPERDINE UNIVERSITY

Graziadio School of Business and Management

#### INFORMED CONSENT FOR PARTICIPATION IN RESEARCH ACTIVITIES

#### DESIGNING AN IMPACT ASSESSMENT FRAMEWORK FOR EVALUATING A LEADERSHIP DEVELOPMENT PROGRAM AT AN EMPLOYEE EXPERIENCE FOCUSED ORGANIZATION

You are invited to participate in a research study conducted by John Ramerman, MS candidate, and Terri Egan, PhD, at Pepperdine University, because you are a graduate of [your organization]'s Leadership Agility Program (LAP). Your participation is voluntary. You should read the information below, and ask questions about anything that you do not understand, before deciding whether to participate. Please take as much time as you need to read the consent form. You may also decide to discuss participation with your family or friends.

#### PURPOSE OF THE STUDY

The purpose of this study was to design a framework for evaluating a leadership development program at [your organization].

#### STUDY PROCEDURES

If you volunteer to participate in this study, you will be asked to take part in a 5- to 10-minute online survey to regarding your ideas and feedback on how we might best evaluate the impacts of the leadership development program.

#### POTENTIAL RISKS AND DISCOMFORTS

The potential but highly unlikely risk associated with participation in this study include possible emotional discomfort as you think about your experiences related to [your organization]'s Leadership Agility Program (LAP).

#### POTENTIAL BENEFITS TO PARTICIPANTS AND/OR TO SOCIETY

While there are no direct benefits to the study participants, there are several anticipated benefits to society, which may include guiding future research or creating services to help evaluate leadership development programs. The results of the program also may help improve future iterations of [your organization]'s Leadership Agility Program (LAP),

#### CONFIDENTIALITY

The data collected for this study will be confidential as far as permitted by law. However, if required to do so by law, it may be necessary to disclose information collected about you. Examples of the types of issues that would require me to break confidentiality are if disclosed any instances of child abuse and elder abuse. Pepperdine's University's Human Subjects Protection Program (HSPP) may also access the data collected. The HSPP occasionally reviews and monitors research studies to protect the rights and welfare of research subjects.



The researcher will record your answers in a password-protected document and a unique identifier (such as “Participant 1”) will be assigned to your information. Any information you share that could uniquely identify you (such names, places, or events unique to you) will be given a fake name and anonymized during the data analysis process.

The data will be stored on a password protected computer in the researcher’s residence for three years after the study has been completed and then destroyed.

### **SUSPECTED NEGLECT OR ABUSE OF CHILDREN**

Under California law, the researcher(s) who may also be a mandated reporter will not maintain as confidential, information about known or reasonably suspected incidents of abuse or neglect of a child, dependent adult or elder, including, but not limited to, physical, sexual, emotional, and financial abuse or neglect. If any researcher has or is given such information, he or she is required to report this abuse to the proper authorities.

### **PARTICIPATION AND WITHDRAWAL**

Your participation is voluntary. Your refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of your participation in this research study.

### **ALTERNATIVES TO FULL PARTICIPATION**

The alternative to participation in the study is not participating or only completing the items for which you feel comfortable.

### **INVESTIGATOR’S CONTACT INFORMATION**

You understand that the investigator is willing to answer any inquiries you may have concerning the research herein described. You understand that you may contact John Ramerman at [contact information], or Terri Egan at [contact information] if you have any other questions or concerns about this research.

### **RIGHTS OF RESEARCH PARTICIPANT – IRB CONTACT INFORMATION**

If you have questions, concerns or complaints about your rights as a research participant or research in general please contact Dr. Judy Ho, Chairperson of the Graduate & Professional Schools Institutional Review Board at Pepperdine University [contact information].

By clicking “I Agree” below, you provide your consent to participate in this study.

- I Agree
- I Do Not Agree [Ends the survey]

### **OVERVIEW**

[Your organization]’s Leadership Agility Program (LAP) has the following goals and objectives:

- Ongoing attention to the already strong and positive culture
- Actively developing top levels of leadership and cultivating high-potential employees now finishing the early stages of their careers at [your organization] so that the next generation of leaders will be ready.
- Find ways to minimize hierarchical distancing to ensure excellent communication and collaboration.

- Hone and maintain [your organization]'s current culture of personal relationship emphasis, trust, community focus and strong business results.
- A vital "culture of accessibility" at [your organization], where critical business conversations are not restricted because of hierarchy, physical location or department affiliation. Leaders will become increasingly agile in their ability to connect with others-no matter their role, level or interpersonal style.
- Continued increase in competitive strength and growth by creating a leadership culture that aligns with results through people, is committed to staying agile in maintaining a great place to work and continues to live the values of [your organization].

1. What is your general impression of LAP?

2. How important do you think it would be to measure the impact of LAP on its effectiveness in educating participants about:

	Not at all important	Slightly important	Important	Fairly important	Very Important	No opinion
Emotional and social intelligence						
Motivating employees						
Interpersonal skills						
Self-awareness						
Predictive Index Communication styles						

3. How important do you think it would be to measure the impact of LAP on its effectiveness in helping participants develop the following behaviors:

	Not at all important	Slightly important	Important	Fairly important	Very Important	No opinion
Enhancing relationships						
Increasing motivation of direct reports						
Cross-functional collaboration						
Executive presence						
Increasing clarity and credibility						

	Not at all important	Slightly important	Important	Fairly important	Very Important	No opinion
Meeting personal development plans						
Making actions that are congruent with organizational values						
Improving self-confidence and self-efficacy						

4. How important do you think it would be to measure the impact of LAP on its effectiveness in helping participants achieve the following business results:

	Not at all important	Slightly important	Important	Fairly important	Very Important	No opinion
Improved leadership performance						
Improved succession planning						
More individual coaching and group development occurring						
Improved interpersonal skill levels						
More productive business critical conversations						
Increased innovation and ideation						
Increased productivity						
New lines of business created						
Structural, policy, work process, and reward changes						

5. How important do you think it would be to measure the impact of LAP on its effectiveness in helping participants achieve the following talent management results:

	Not at all important	Slightly important	Important	Fairly important	Very Important	No opinion
Improved retention						
Improved morale						
Increased bench strength (e.g., more high potential leaders with increasing emotional intelligence and social agility to take more senior positions as [your organization] grows)						
Engagement						
Improved 360-degree review results						
Improved performance review scores						
Improved team scores						
Increased revenue						

6. What year did you complete LAP?

- 2013
- 2014
- 2016

7. Please indicate your gender:

- Male
- Female

8. What was your position at [your organization] when you participated in LAP?

9. Is there anything else you would like to add about LAP or evaluating its impacts?

Thank you for your participation!

## Appendix E: Interview Script

Thank you for volunteering to be part of the study. The purpose of my research is to create an evaluation process for assessing the impact of [your organization]'s Leadership Agility Program (LAP). Your insights will be pooled with others' and used to create an impact assessment process.

Before we get into the questions, I wanted to remind you of the leadership program goals and objectives:

1. Ongoing attention to the already strong and positive culture
2. Actively developing top levels of leadership and cultivating high-potential employees now finishing the early stages of their careers at [your organization] so that the next generation of leaders will be ready.
3. Find ways to minimize hierarchical distancing to ensure excellent communication and collaboration.
4. Hone and maintain [your organization]'s current culture of personal relationship emphasis, trust, community focus and strong business results.
5. A vital "culture of accessibility" at [your organization], where critical business conversations are not restricted because of hierarchy, physical location or department affiliation. Leaders will become increasingly agile in their ability to connect with others-no matter their role, level or interpersonal style.
6. Continued increase in competitive strength and growth by creating a leadership culture that aligns with results through people, is committed to staying agile in maintaining a great place to work and continues to live the values of [your organization].

### Warm-up Questions

1. What is your general impression of the Leadership Agility Program (LAP)?
2. In what ways do you think it is successful?
3. In what ways do you think it could be more successful?

### Transition:

Thank you for your responses so far. The rest of the questions will now be focused on the process of how to evaluate the Leadership Agility Program.

### Open-ended Responses

4. When you think about a process to evaluate the LAP, who do you should be included that effort?
5. What impacts do you think should be measured?
6. What forms and types of data would you gather in this kind of evaluation?

Possible prompts:

- Interviews (with whom? asking what?)

- Surveys (of whom? asking what?)
- Performance reviews
- Observation (of what or whom?)

### **Feedback on Proposed Impact Evaluation Framework**

Now I would like your feedback on some additional ideas about impacts to assess. One way to think about evaluating impacts is assessing the knowledge gained, behaviors developed and applied, and results achieved by participants of the program. Looking and thinking about the program as well as the leadership challenges and realities at [your organization]:

#### **Knowledge**

7. What are the top three knowledge areas from this list that participants should gain through the program?
  - Emotional and social intelligence
  - Motivating employees
  - Interpersonal skills
  - Self-awareness
  - Predictive Index communication styles
8. What made you choose those three?
9. What forms and types of data would you gather to assess participants' knowledge in these areas?  
Possible prompts:
  - Interviews (with whom? asking what?)
  - Surveys (of whom? asking what?)
  - Performance reviews
  - Observation (of what or whom?)

#### **Behaviors to Develop**

10. What are the top three behaviors from this list that participants should gain through the program?
  - Enhance relationships
  - Increasing motivation of direct reports
  - Cross-functional Collaboration
  - Executive Presence
  - Increase clarity and credibility
  - Personal development plans – achievement of goals and outcomes
  - Actions congruent with organization values
  - improved self-confidence and self-efficacy
11. What made you choose those three?

12. What forms and types of data would you gather to assess participants' behaviors?

Possible prompts:

- Interviews (with whom? asking what?)
- Surveys (of whom? asking what?)
- Performance reviews
- Observation (of what or whom?)

13. Over what time frame should these behaviors be expected?

### **Results achieved**

14. What are the top three business results from this list that participants should gain through the program?

- Improved leadership performance
- Improved succession planning
- More individual coaching and group development occurring
- Improved interpersonal skill levels
- More productive business critical conversations
- Increased innovation and ideation
- Increased productivity
- New lines of business created
- Structural, policy, work process, and reward changes

15. What made you choose those three?

16. What forms and types of data would you gather to assess these results?

Possible prompts:

- Interviews (with whom? asking what?)
- Surveys (of whom? asking what?)
- Performance reviews
- Observation (of what or whom?)

17. Over what time frame should these results be expected?

18. What are the top three talent management results from this list that participants should gain through the program?

- Improved retention
- Improved morale
- Increased bench strength (e.g., more high potential leaders with increasing emotional intelligence and social agility to take more senior positions as [your organization] grows)
- Engagement
- Improved 360-degree review results
- Improved performance review scores

- Improved team scores
- Increased revenue

19. What made you choose those three?

20. What forms and types of data would you gather to assess these results?

Possible prompts:

- Interviews (with whom? asking what?)
- Surveys (of whom? asking what?)
- Performance reviews
- Observation (of what or whom?)

21. Over what time frame should these results be expected?

### **Closing Questions**

22. Is there anything else you would like to add regarding the process of evaluating the impacts of the LAP?

23. This concludes my formal questions, is there anything else you'd like to add?

24. May I call you if something comes up after this?

25. Do you have any questions for me?

Thank you for your insights and feedback. They are much appreciated and highly valuable to my research.