

LEARNERS' LIVED EXPERIENCES FOR FILLING OUT A PROFESSIONAL  
DEVELOPMENT PROGRAM'S FORMAL EVALUATION AFTER LEARNING ABOUT  
THE KIRKPATRICK EVALUATION FRAMEWORK:  
A TRANSCENDENTAL PHENOMENOLOGY STUDY

by

Judine Eleanor Bishop

Liberty University

A Dissertation Presented in Partial Fulfillment

Of the Requirements for the Degree

Doctor of Philosophy

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### **Abstract**

The purpose of this transcendental phenomenology study was to discover learners' lived experiences for filling out a formal evaluation to complete a professional development program about the Kirkpatrick Evaluation Framework for African American librarians and educators who are members of a Black Caucus affiliate group. The theory guiding this study was the adult learning theory by Knowles et al., who hypothesized that adults learn by using self-direction to build on their experiences knowing why training courses will benefit their lives. The adult learning theory provided a framework to answer the central research question and two sub-questions: (CRQ) What are learners' lived experiences for filling out a professional development program's formal evaluation after learning about the Kirkpatrick Evaluation Framework? (SQ1) What happened with learners' lived experiences for determining the need or creating a strategy from an evaluation after completing a professional development program? (SQ2) What happened with learners' lived experiences for implementing a strategy or assessing the fulfillment from an evaluation after completing a professional developmental program? Participants were selected from a purposeful sampling of those who filled out a formal evaluation to complete an online self-paced training course about the Kirkpatrick Evaluation Framework. The data was analyzed and synthesized from data collection methods of journal prompts, a focus group, and the researcher's observations, then analyzed using Moustakas's method for evaluating phenomenological data. Data collection results generated commonalities and themes from the literature review. Empirical, practical, and theoretical implications of the data analysis and recommendations for future research were identified.

*Keywords:* adult learning theory, Kirkpatrick Evaluation Framework, lived experiences, online training, professional development programs

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### **Dedication**

I dedicate this dissertation to my creator, from whom all good things flow!

To my parents, who gave me moral lessons in discipline and determination.

To those who have encouraged my success.

To those who believed in my abilities to earn a doctorate.

To my children, may you continue to pursue knowledge throughout your lives.

## **Acknowledgments**

I want to acknowledge and thank those who have helped me along this journey, including my committee chair, committee member, peers, editors, professors, and participants.

My views expressed in this study do not necessarily represent those of the United Black Writers Association, Inc.

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### **List of Abbreviations**

American Psychological Association (APA)

American Library Association (ALA)

Black Caucus of the American Library Association (BCALA)

Black Caucus of the Maryland Library Association (BCMLA)

Federal Aviation Administration (FAA)

Flipped Classroom Model (FCM)

Human Performance Technology (HPT)

Kappa Delta Pi (KDP)

Kirkpatrick Evaluation Framework (KEF)

Maryland Library Association (MLA)

Massive Open Online Course (MOOC)

National Black Caucus of the Federal Aviation Administration (NBCFAE)

Professional Development Program (PDP)

Science, Technology, Engineering, and Math (STEM)

U. S. Government Accountability Office (USGAO)



## **CHAPTER ONE: INTRODUCTION**

### **Overview**

Many leaders and executive boards in organizations do not require a formal evaluation after an offered professional development program (PDP). This chapter provides a framework for the background on the historical, social, and theoretical aspects of learners' lived experience about a series of formal evaluations offered after the PDP. This chapter also addresses the study's significance, research questions, and definitions related to the lived experiences to complete an online self-paced PDP as related to the adult learning theory. The summary relates the need for a formal evaluation process as an integral association with training courses, which could potentially to identify inequities in learning for African American. The following terms are interchangeable, to include professional development program with training or training course, learner with member, learner's management with the learner's employer, organization management with the organization leadership, and training with a professional development program.

### **Background**

One reason many African American librarians and African American educators become members of associations with Black Caucus as an affiliate group is to advocate for resources in African American communities and to help identify inequities in training and development for African Americans (Black Caucus of the American Library Association, 2024; Black Caucus of the Maryland Library Association, n.d.). One method currently used to and identify inequities in professional development programs (PDP) for members is through informal evaluations or assessments presented during the year, such as communication channels: smiles or frowns on learners' faces, emotional icons, chat responses, discussions, or direct emails to the

facilitator before, during, and after training (Tobias de Sousa Lima et al., 2022). Another method to potentially identify inequities for learners, who attend an annual conference, to complete a formal evaluation after a PDP and receive continued education contact hours. The challenge is to consistently collaborate, advocate and educate about the benefits of completing formal evaluations after training provided by the organizational leadership to improve the upcoming African American training needs, especially with potential retirements, advancements of emerging aviation technologies, and new forms of information and communication technologies (Oh & Hong, 2020; Puig et al., 2020; U. S. Government Accountability Office, 2020).

### **Historical Context**

Organizations provide training for an employee to effectively perform their job functions. Whether in a professional development program, or on-the-job-training known as OJT, training is a basic need providing knowledge, skills, and abilities (Knowles et al., 2020). Training has three important functions to include: enhancing new or existing knowledge, experiencing new behaviors from knowledge gained, and finding out how the learner feels after the training through sharing the knowledge (Rey-Becerra et al., 2021). In many organizations, these three functions have been informally performed by the learners such as emotional icons, chat responses, individual assessments, group discussions, or a direct email to the facilitator before, during, and after a professional development program (Tomlinson, 2021). Where formal evaluations are not consistently offered after training, a change to include a series of formal evaluations would involve an initiation from organizational leadership.

Most organizations and associations offer professional development programs (PDP), where the leadership controls the training content; however, the leadership or program presenters

do not always require the learner to complete a training evaluation. In some cases, even when the programming presenters do not request an evaluation after training, the learners receive a certificate of training, which states training took place; however, does not evaluate learners' reaction and learning of the training. Not requiring a formal evaluation has a domino effect on African Americans because without the evaluation, it is difficult to have a consistent analysis of professional development programs to determine how the statistics identified to identify the learning inequity of ignored needs in the African American community (Agrela de Andrade et al., 2022; U.S. Government Accountability Office, 2020). Changing the priority of professional development programs (PDP) to include an evaluation process as an essential component of training could be important, because the work of all learners, whether a student, a parent, or an employee in the workplace, indirectly affects the African American's experience, and evaluating training promotes collateral investments for member input (Bolman & Deal, 2017). Including an evaluation process as part of the training program would be a cultural change for the organization, which is a positive step to address oversight activities. Without recurring, membership-wide assessments of training courses, the organization is limited in its ability to efficiently target workforce strategies such as training (U.S. Government Accountability Office, 2020).

### **Social Context**

A Black Caucus is usually adopted as an affiliate membership group of the primary association (Maryland Library Association, 2023). For example, the Black Caucus of the Maryland Library Association's objective is to support the Black community by providing a safe space to for discussion, working with others to promote and recruit African Americans to the profession for equal job opportunities, promoting professional development, improving the

quality of service in Black communities, and developing policy and legislation that ensures equity, opportunity and access to information for African Americans and other marginalized communities as it relates to African American librarians, African American educators, or members of an association with a Black Caucus (Black Caucus of the Maryland Library Association, n.d.; Kappa Delta Pi, 2024). Implementation of an evaluation process could collectively affect equity in lived experiences of learning for marginalized communities and indirectly enhance professional development (Kirkpatrick Partners, 2024a).

Using the Kirkpatrick Evaluation Framework (KEF) as the format for analyzing a series of formal evaluations could be a social and cultural change. The KEF has four levels of assessment: Level 1-Reaction, Level 2-Learning, Level 3-Behavior, and Level 4-Performance, which should be incorporated together with a multi-dimensional approach (Kirkpatrick Partners, 2023a; Zhivotovsky, 2019). These four levels of assessment have the potential ability to improve the training and change the learning environment to a community-centered or equity-centered workspace (Abadi et al., 2020; Garcia & Lee, 2020; Tomlinson, 2021). The researcher chose the Kirkpatrick Evaluation Framework after learning about this process while working at the Federal Aviation Administration, which created the desire to advocate librarians, educators, and members of Black Caucuses for participation to determine the lived experience of sociocultural change from formal evaluations to identify learning inequities for African Americans (Black Caucus of the Maryland Library Association, n.d.; Bertolotto et al., 2022; Maryland Library Association, 2023).

### **Theoretical Context**

The adult learning theory hypothesizes that adults learn by using self-direction to build on their experiences and knowing why and how the learning will benefit their lives (Knowles et

al., 2020). By expanding on adult learning theory, the organization would begin to educate the learners about a series of formal evaluations as part of the training process from a controlled training program and advocate the learners to work collaboratively to identify learning inequities for African Americans (Battel-Kirk & Sendall, 2022; Black Caucus of the Maryland Library Association, n.d.; Maryland Library Association, 2023; U. S. Government Accountability Office, 2020). The relationship between the use of tools and the motivation to apply the knowledge gained from the tool has become known as the sociocultural theory accredited to Lev Semenovich Vygotsky (Schunk, 2020). Because adult learners bring experience to their training, the expected sociocultural results of the formative-summative evaluations are to narrow the zone of proximal development between what was known and what is learned from others and the environment and to encourage motivation and self-confidence when sharing the applied knowledge (Bin Mubayrik, 2020; Frechette, 2020; Vygotsky, 1978). In this study, I am suggesting a need for a formal evaluation process after completing an online self-paced professional development program (Knowles et al., 2020).

### **Problem Statement**

The problem is in many organizations the Kirkpatrick Evaluation Framework's four levels are not formally adopted for professional development programming where the organizational leadership provides the content (Cariñanos-Ayala et al., 2022; Olsson et al., 2022; Rey-Becerra et al., 2021). Requiring an evaluation process during or after professional development programs could be viewed as an organizational leadership's implementation of sociocultural diversity and recognizing the importance of inclusivity, especially for African Americans (Kirkpatrick Partners, 2024a). Completing the four levels of the KEF could maximize and demonstrate the value-added to development programming, especially with online

professional development programs, which can systematically provide knowledge and skills for learner outcomes and course effectiveness (Lane et al., 2020). A review of the literature shows many other organizations, applied the KEF's Level 1 at 72%, Level 2 at 32%, Level 3 at 12%, and Level 4 at 7% (Hauser et al., 2020), with only 1% of the organizations assessing at all four levels of training assessment (Ameh et al., 2019). Although the end goal was to complete all four levels of the KEF, starting the process with the Level 1 and Level 2 evaluations after professional development programming was an important beginning to becoming a learning and performance organization (Kirkpatrick Partners, 2023a).

A series of formal evaluations requires learners' buy-in to learn and implement the methodology, in addition to the management and training resources needed to develop the course content (Bari et al., 2021). However, despite the challenges, current research on the Kirkpatrick model as a quality improvement tool has shown to increase employee's knowledge and skills (Ameh et al., 2019; Cassie et al., 2021), the effectiveness of understanding employee's views and experiences (Campbell et al., 2019), with coaching like Kirkpatrick's Level 3 showing positive effects on learning and performance outcomes (Jones, 2020; Plotinsky, 2023). The current literature also provides how an evaluation process could show the effectiveness of employee's performance; however, the research lacks in explaining the necessity for the employees to understand how the evaluation impacts the training program and lacks in the observations of technology used for technical education (Hauser et al., 2020; Horvitz et al., 2020).

### **Purpose Statement**

The purpose of this transcendental phenomenology study was to discover learners' lived experiences for filling out a formal evaluation to complete a professional development program about the Kirkpatrick Evaluation Framework for African American librarians and educators who

are members of a Black Caucus affiliate group. At this stage in the research, the lived experiences with a series of formal evaluations to complete a self-paced training course will be generally defined as lived experiences. These learned experiences would be defined by how adult learners attain knowledge and skills in a collaborative learning environment and collectively advocate for the education to identify inequities in learning for African American writers (Lindeman, 1926; Maryland Library Association, 2023). The theory guiding this study is the adult learning theory by Malcolm S. Knowles, Elwood F. Holton III, Richard A. Swanson, and Petra A. Robinson (2020). The adult learning theory is a constructivist perspective in connection with a series of formal evaluations where the learners self-direct sociocultural learning environments based on life experiences from building relationships and interactions with management and teams (Kirkpatrick Partners, 2024h). Adult learning comprises the self and others with cognition, motivation, self-determination, and collaboration, which are formed by the sociocultural environment (Chirkov, 2020). The relationship of the adult learning theory to the evaluation process would discover learners' lived experiences skills when filling out an evaluation after completing the online self-paced professional development program, which could potentially reduce the cognitive load for a transfer of skills to identify inequities in learning for African American (Dohn et al., 2020; Jewer et al., 2019; Pallari et al., 2020).

### **Significance of the Study**

The significance of this study is that previous research has studied the effectiveness of the Kirkpatrick Evaluation Framework's (KEF) four levels of training assessment as separate components (Ameh et al., 2019; Hauser et al, 2020; Rey-Becerra et al., 2021). From this study, I fill the gap for discovering learners' lived experiences from learning about the outcomes of the KEF's four levels for shared decision-making, which could be valuable information for the

design of training evaluations (Müller et al., 2019). From this study, I also explore the gap of discovering learners' lived experiences on the importance of the training evaluation as part of the training process (Khaskhelly & Khoso, 2018). Having learner support may help organizations develop changes to the training course content (Johnson et al., 2020). Lastly, from this study I potentially inform organizational leadership of the gap for ongoing research on evaluating the empirical impact of training for initiating quality improvement programs (Horvitz et al., 2020; Pallari et al., 2020).

### **Theoretical**

Theoretically, in this study I relate to other studies by understanding an employee's lived experiences of the Kirkpatrick Evaluation Framework (KEF) as a collaborative effort through the social exchange theory with cohesiveness and interaction (Homans, 1958; Kirkpatrick Partners, 2024c), and an employee's response to an online course about a series of formal evaluations through the cognitive load theory with working memory (Hadad et al., 2021; Sweller, 2020). Using this phenomenal study allows the researcher to identify group patterns, which can alter the environmental stimulation to reach goal attainment through knowledge development through the human motivation theory (Gabel, 1999; Hadad et al., 2021; Maslow, 1970; Schunk, 2020). The first three levels of the KEF are meant to work as a repetitive collaborative effort between the learner and the learner's manager. From this study, I could also include the lived experiences of the organizational leadership because these learners might have the challenge of working with the fourth level of the KEF, which has the responsibility for ensuring the evaluation methods and data collection are meeting their needs (Al Shamari, 2022).



## **Empirical**

Empirically, there is the belief that knowledge is gained through shared decision making (Thomas et al., 2020). Applying the Kirkpatrick Evaluation Framework could potentially help the organizational leadership to drive sustainability and act innovatively by promoting learning from the African American's empirical assessments, rather than viewing these employees as objects or tools to get the job done (Agrela de Andrade et al., 2022; Bolman & Deal, 2017; Khan, 2021). If the study shows a positive learned experience from the professional development program for a series of formal evaluations, the training could become an online tool as a change agent for leadership (Hadad et al., 2021).

## **Practical**

The practical significance of this study for associations with a African American librarians, African American educators, or members of an association with a Black Caucus is serving as guidance to potentially identify inequities with learning and development for African Americans, similar to the bylaws for the Black Caucus of the American Library Association and the Black Caucus of the Maryland Library Association (Black Caucus of the American Library Association, 2024; Black Caucus of the Maryland Library Association, n.d.). Individually assessing whether librarians, educators, or members of an association with a Black Caucus have the skills needed to carry out their responsibilities does not provide an organization-wide view of competency gaps (U.S. Government Accountability Office, 2020). Establishing the Kirkpatrick Evaluation Framework's four levels of assessment as a mandatory collective practice relies upon the learner to at minimum to begin by completing the first level of the Kirkpatrick Evaluation Framework, whereby the learners could be considered partners in their education (Thomas et al., 2020). The impacts of effective organizational leadership are finding out learners' lived

experiences for promoting change, preparing the organization for change, and supporting the outcomes of change (Khan, 2021).

### **Research Questions**

The evaluation becomes task-centered instruction where the learner applies supportive information from the professional development program's content, determining the progression of learning to receive coaching and feedback from the applied tasks, where applicable (Chang & Chen, 2020; Eriksson et al., 2020; Tomlinson, 2021). The instructional design in an online self-paced training course can influence the motivation for storing information in working memory to complete the outcomes and reaching the organization's goals (Driscoll & Burner, 2021; Maryland Library Association, 2023; Sweller, 2020; Wang et al., 2020). Increasing intrinsic motivation can be advantageous over increasing extrinsic motivation in terms of outcomes (Wijsman et al., 2019). I derived this study's research questions about a formal evaluation process from the adult learning theory and probe learners' lived experiences after taking professional development programs, whether online or in person. (Knowles, 1990; Knowles et al., 2020).

### **Central Research Question**

What are learners' lived experiences for filling out a professional development program's formal evaluation after learning about the Kirkpatrick Evaluation Framework?

### **Sub-Question One**

What happened with learners' lived experiences for determining the need or creating a strategy from an evaluation after completing a professional development program?

## Sub-Question Two

What happened with learners' lived experiences for implementing a strategy or assessing the fulfillment from an evaluation after completing a professional developmental program?

### Definitions

1. *Andragogy* – The art and science of helping adults learn (Knowles, 1980).
2. *Cognitive Load* – Working memory characteristics that are fixed and can only be altered by changes in long-term memory via the information store and environmental organizing and linking principles (Sweller, 2020).
3. *Epoché* – To refrain from judgment; to abstain from or stay away from the everyday, ordinary way of perceiving things (Moustakas, 1994).
4. *Growth Mindset* – Our beliefs about intelligence, and the ability to change mindsets can have impacts on how we approach challenges, respond to criticism challenges, and orient our goals. (Dweck, 2017).
5. *Imaginative Variation* – A structural differentiation among the infinite multiplicities of actual and possible cognitions, that relate to the object in question and thus can somehow go together to make up the unity of an identifying synthesis (Husserl, 1977).
6. *Kirkpatrick Evaluation Framework* – Time-tested four levels of evaluation to operationalize effectively in the world of business, government, military, and not-for-profit organizations (Kirkpatrick & Kirkpatrick, 2016).
7. *Sociocultural Perspective* – Different ways of processing information that could encumber students who are not afforded alternative pathways to mastery (Frechette, 2020).

8. *Technogenetic* – The development of technologies of cognition and the convergence of audiovisual, informatic, and telecommunications techniques with cultural technologies through new media (Van Manen, 2014).
9. *Transcendental-Phenomenological Reduction* – Each experience is perceived and described in its totality, in a fresh and open way, with variations of perceptions, thoughts, and feelings (Husserl, 1977).
10. *Zone of Proximal Development* – The difference between what the learner knows and what is learned from others and the environment (Vygotsky, 1978).

### **Summary**

Evaluations have been underrated and the least developed tool in organizations because it is difficult and time-consuming, especially for time record information, time for data collection, and time to identify barriers (Cassie et al., 2021; Sahni, 2020). The problem is in many organizations the Kirkpatrick Evaluation Framework's four levels are not formally adopted for professional development programming where the organizational leadership provides the content (Cariñanos-Ayala et al., 2022; Olsson et al., 2022; Rey-Becerra et al., 2021). The purpose of this transcendental phenomenology study was to discover learners' lived experiences for filling out a formal evaluation to complete a professional development program about the Kirkpatrick Evaluation Framework for African American librarians and educators who are members of a Black Caucus affiliate group. A series of formal evaluations, which could be difficult and time-consuming to implement, but the data collected could help to determine which subjects were more challenging, with results to benefit future learners in a reformulated training, rather than a preferred or static solution (de S. Bergamo et al., 2022). The training course I developed in this

study could also be a prominent tool to enhance learners' lived experience before completing a formal evaluation, and eventually allow for organizational success (Mehale et al., 2020).

## **CHAPTER TWO: LITERATURE REVIEW**

### **Overview**

A formal evaluation process and an online self-paced professional development program could be tools to improve the collaboration and communication, about learners' need for competencies and organizational results (Kirkpatrick Partners, 2024d; Schunk, 2020). Learning about the value of a formal evaluation process after completing a professional development program, the organization or association could ensure current and future learners have the skills required for the advancement of new technologies (Liu and Zainuddin, 2021). The adult learner can acquire knowledge using online tools that provide some entry experience, which will help improve their intrinsic motivation to become a self-directed learner (Knowles et al., 2020; Schunk, 2020). In this study, I present Chapter Two with the theoretical framework and related literature for a training course about a formal evaluation process as influenced by the adult learning theory.

### **Theoretical Framework**

Although Dr. Donald Kirkpatrick did not ground his dissertation about evaluation human relations programs in an educational theory; the Kirkpatrick Evaluation Framework (KEF) remains a transferable and credible evaluation practice (Kirkpatrick, 1954; Sitzmann & Weinhardt, 2019). Behavior theorists acknowledge evaluation shows up immediately after training (Knowles, 1990). For example, B. F. Skinner (1953) hypothesized reinforcing the stimulus, or training, would more likely occur after responding to the stimulus. Edward L. Thorndike (1914) hypothesized learning involves perception and response of the stimulus, or training. These theories could relate to Level 1 of the KEF: the learner provides a reaction on if the training was motivating and relatable to the job (Zhivotovsky, 2019).

Cognitive theorists acknowledge the adult learner should be able to apply the learning (Knowles, 1990). For example, Albert Bandura (1977, 1988) initially hypothesized self-efficacy is learners' perceived capability to perform, and then expanded this theory and hypothesized self-regulation or the way a learner will denote discrepancies between personal standards and actual performance. The adult learning theory is also a cognitive theory as it links learners' experiences with the need for new information (Knowles, et al., 2020). These theories could relate to Level 2 of the KEF: the learner uses descriptive language on how the training provided learning skills necessary to complete the job (GreggU, 2023).

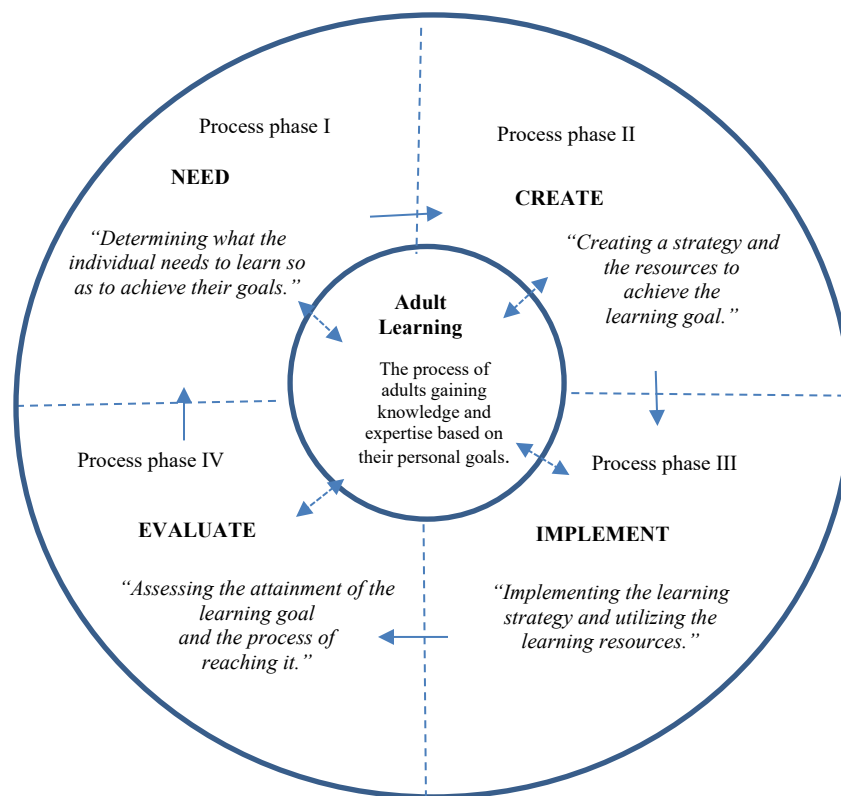
Humanist psychologists acknowledge the importance of cognition and a change in behavior (Knowles, 1990). For example, Abraham Maslow (2013) hypothesized human motivation is driven by a hierarchy of five basic needs: physiological, safety, belonging or social, self-esteem, and self-actualization or personal growth, with the desire for gaining knowledge. Ryan and Deci (2017) hypothesized the self-determination theory where adults are inclined to share or collaborate their knowledge if they perceive learning will supplement previous knowledge to facilitate a growth mindset. These theories could relate to Level 3 of the KEF: the learner receives support from a manager or other colleague after repeated application of the learning to discover a behavior change (Growth Engineering, 2023).

The first three levels of evaluation can provide data analytics to show the knowledge the learners have gained and how they have applied the knowledge. Organization theorists acknowledge the learning should be confirmed and validated (Knowles, 1990). Relating to Level 4 of the KEF: the results of the evaluations can determine the training course's viability or the next course of action (The Training Minute, 2023).

Andragogy is built upon the knowledge from a training program based on the adult's interests, which creates a transformation involving what the learner thought they knew into a reframing of the understanding from their sociocultural models (Chirkov, 2020). Knowles et al. (2020) have updated the adult learning theory as the process of adults gaining knowledge and expertise based on their personal goals. See Figure 1 for Theoretical Foundation of Adult Learning.

Figure 1.

*Theoretical Foundation of Adult Learning*



*Note:* I created the graphic of Swanson's (1996) Phases of Adult Learners as cited in Knowles et al., p. 157, 2020.



## **Situational Principles**

There are four situational principles involved in the online professional development program fundamental to the adult learning theory, which are determining the need, creating a strategy and resources, implementing the learning strategy, and assessing the attainment of the learning goal (Knowles et al., 2020). Applying the first principle to the online training, the organizational leadership or the instructional designer empathizes and encourages learners' cognitive growth by determining the need for value-added of the evaluation for not only themselves, but for future trainees, which might encourage the learner to self-regulate completion (Knowles et al., 2020).

The second situational principle would be creating personalized instruction for online learning based on the distance between the actual development level as determined by independent problem solving, the level of potential development as determined through self-directed problem solving, whether independently or under guidance in collaboration with more capable peers, and the challenge of rapidly changing professional situations (Knowles et al., 2020, Oh and Hong, 2020; Vygotsky, 1978). Organizations should evaluate training, even though the learning setting is vastly different from what most learners have experienced with face-to-face learning. It can be easy for learners to get discouraged in online environments, where they may be expected to engage with video conferencing, chats, and possibly Internet connectivity issues (Almusharraf & Bailey, 2021). The professional development program's presenter or the instructional designer should be comfortable using a technogenetic tool, such as a learning management system or a web conferencing platform to help improve online meeting engagement (Kirkpatrick Partners, 2024e).

The third situational principle would be Implementing the learning strategy by enabling learner-generated content with a constructivist methodology (Knowles et al., 2020). With the advancements of social media, the organization could establish an evaluation content forum accessible from any device (Broadbent et al., 2020). An easily accessible type of evaluation might encourage the learners to complete their evaluations directly after the training ended, if they knew that they could use their mobile devices to access the evaluations. Student engagement and satisfaction with mobile device may differ from desktop computers (Andujar et al., 2020).

The fourth situational principle from the adult learning theory would be for the leadership to assess the attainment of the learning and the tools used through the analysis of data from the first three levels of the Kirkpatrick Evaluation Framework to ensure current and future generations have the appropriate knowledge, skills, and abilities to become champions (Kirkpatrick Partners, 2024e).

### **Related Literature**

An instructional designer should create a process that assists with intrinsic motivations, decreases the extrinsic motivations, improves learners' cognitive load on the area of study, and allows applying the resource to the organization's needs (Agrela de Andrade et al., 2022; Brown & Green, 2020; Schunk, 2020). The following related literature reviews the literature through the description of three themes, including the philosophy of education, knowledge sharing, and educational technology and design, which impact all areas of education and assessments. Each theme reviews the literature related to the Kirkpatrick Evaluation Framework or an online self-paced professional development program.

The first theme, philosophy of education, relates the literature with a background of adult learning from Knowles' theory and how this theory transformed to the understanding of adult's training effectiveness with the Kirkpatrick Evaluation Framework, which affects formative and summative evaluation, and human motivation (Knowles et al., 2020). The second theme of knowledge sharing relates literature with cognitive load, public service motivation, collaboration, and growth mindset. The third theme of educational technology and design relates the literature with technology tools, instructional design, human performance technology, scaffolding, and flipped education. Grounding the Kirkpatrick Evaluation Framework and the online self-paced professional development program with the adult learning theory could act as both an instructional design and human performance intervention and close the gap in the literature from previous research (Knowles et al., 2020).

### **Philosophy of Education**

Malcolm Knowles (1977) initially hypothesized the adult learning theory on the distinct aspects of the parent, or adult learner-centered focus. Because the world continues to have family units in many facets, there is a continuous need for philosophical studies in the present-day's educational research into the adult learning theory (Knowles et al., 2020; Leś, 2021). In this study's review of literature for philosophy of education theme, training on effectiveness, the Kirkpatrick Evaluation Framework, formative and summative evaluation, and human motivation, I provide a relationship with the lived experiences with learners in filling out formal evaluation after completing an online self-paced professional development program.

### ***Training Effectiveness***

To meet the need for training effectiveness, Han et al., (2023) determined external motivation, team support, and training positively influence job satisfaction, while intrinsic

motivation, managerial level, and length of service have less support to influence training. The positive influences from the professional development program could be comparable to the first three levels of the KEF because the self-directed learning experience could lead to further learning, and a formal evaluation process could lead to reassessing the differences between current training content and external motivation encouraging a transfer of knowledge (Growth Engineering, 2023; Knowles et al., 2020).

Recognizing the need to analyze the results of training content determines how teams and technology can work together with the approaches of closing the gap between what the learners know, how they can learn from each other, and where improvements can be made, if necessary (American Evaluation Association, 2020). To establish true training effectiveness, all three of these approaches should be measured iteratively and not independently within a period less than one month, because of the various ways that learners learn, knowledge decline and changes learners' attitudes over time (Olsson et al., 2022). Instead of looking at the online self-paced professional development program as a linear process with a beginning and end, the levels should be considered a sociocultural or iterative process, knowing each component affects others, and the evaluations may need to be repeated or revised depending on the results (Frechette, 2020; Lane et al., 2020).

Additional conclusions were applicable for the value of evaluations when applied to training. Rey-Becerra et al. (2021) concluded from 17 journal articles and 4 conference papers on the safety of working at heights, the training effectiveness design should apply to any industry or any type of learner. The professional development program simply explains the benefits of a series of formal evaluations, to stimulate any learners' motivation to complete an evaluation, allowing creativity or necessity for the type of questions asked. Ameh et al. (2019) concluded

from 88 papers, or reports, on emergency obstetric care the use of measurements before training may show more effectiveness than only the use of measurements after the training, confirming the need for the training before implementation of an evaluation program. Campbell et al. (2019) concluded from 30 studies about online training for cancer care effectiveness should lean more on learners' lived experience and satisfaction rather than statistical data.

In contrast, other studies found using the Kirkpatrick Evaluation Framework's (KEF) Level 1 and Level 2 showed training effectiveness (Baseer, 2020; Sahni, 2020). Although it is not indicated, these studies might be a result of the lower response rate for Kirkpatrick's Level 3 and Level 4, which often do not have significant measurement numbers or are neglected in organizational training evaluations (Almeneessier et al., 2021; Hauser et al., 2020). The lower response rate for the specific levels could also explain why the KEF has been criticized for the reliance on the subjective or linear measure of the learner rating themselves in Level 1 and Level 2, and not specifically providing information on how to improve the training effectiveness, if necessary (Dohnt et al., 2021). Especially with Level 3 measuring behaviors, and not necessarily how the learner feels about the implementation of the training, the statistics do not explain why the learner was motivated to apply the learning to the task (Jones, 2020). Establishing a continual or iterative method of training effectiveness by incorporating a series of evaluations as an integral part of the training program could help organizations eventually raise awareness of potential sociocultural behavior changes over an extended length of time greater than one evaluation immediately after taking the training (Ameh et al., 2019; Bimpitsos and Petridou, 2012; Chirkov, 2020). As related to training effectiveness, the professional development program would complement any training content as a reminder of how learners' reaction, learning, behavior, and overall evaluation results are a collaborative effort, which has the potential to

identify inequities in learning for African American’s sociocultural environment (Black Caucus of the Maryland Library Association, n.d.; Frechette, 2020).

### ***Kirkpatrick Evaluation Framework***

To determine training effectiveness, Dr. Donald Kirkpatrick hypothesized four phases of the Kirkpatrick Evaluation Framework (KEF): reaction, learning, behavior, and results (Kirkpatrick, 1954). Without all four levels of the KEF, there could be a lack of evidence for training effectiveness. However, beginning with Level 1 of the KEF and slowly implementing the next three levels is a good beginning. From this study, I help to close the gap on the benefits of collecting sociocultural data from learners after taking a professional development program about a series of formal evaluations, which has the potential to identify inequities in learning for African American (Black Caucus of the Maryland Library Association, n.d.; Frechette, 2020).

See Table 1 for Kirkpatrick Evaluation Framework’s Four Levels.

**Table 1**

#### *Kirkpatrick Evaluation Framework’s Four Levels*

Level	Description of Levels
1-Reaction	Reaction is the degree to which participants find the training favorable, engaging, and relevant to their jobs.
2-Learning	Learning is the degree to which participants acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the training.
3-Behavior	Behavior is the degree to which participants apply what they learned during training when they are back on the job.

Level	Description of Levels
4-Results	Results is the degree to which targeted outcomes occur because of the training and the support and accountability package.

*Note:* Kirkpatrick & Kirkpatrick, p. 10, 2016

**Level 1: Reaction.** The Level 1 evaluation is often considered a post-test, or a happy sheet with basic knowledge about the course instruction, the trainer, and course setting (The Training Minute, 2023). If the Level 1 evaluation denotes the end of the training, there is no motivation for the employee to continue implementing what they have learned. Training programs should require employee skill development and organizational goal development that motivates employees to work smarter, and not harder, for the organization (GreggU, 2023). Determining the right data collection requires investments of time and additional resources (Minbaeva, 2018).

**Level 2: Learning.** The Level 2 evaluation gathers data on how much the learner has gained from the course compared to what they previously knew (Zhivotovsky, 2019). The evaluations from Level 1 and Level 2 can be taken within one to thirty days after the training, depending on the length of the course. In a critique of the Kirkpatrick Evaluation Framework (KEF), there is a greater volume of research for KEF, which indicates an effective tool for evaluations in comparison to other evaluation models (Alsalamah & Callinan, 2022). For example, in a descriptive quantitative study of managerial training effectiveness with 145 full-time middle-level managers nominated in two sets of evaluation, KEF's Level 1 and Level 2 evaluation, with a five-point Likert scale for training satisfaction and measure of learning taken immediately after training, 136 of the managers, or 93% of that elected, self-elected not to participate in the evaluations (Sahni, 2020). Although the study found a positive relationship

between the four constructs with training effectiveness for the Level 1 and Level 2 evaluations; this relationship does not indicate actual behavior, or the Level 3 evaluation (Sahni, 2020).

**Level 3: Behavior.** There is no specific time frame when providing the Level 3 evaluation and has the advantage of being a coaching mechanism from the manager to learners' behavior and performance (Plotinsky, 2023). This level can be a determinant to how learners' behavior depends on the assessment of tools and technology used, and if learners' responses from problem solving and implementation of the material resulted in effective training (Imansari et al., 2023). This level of performance could be measured through descriptive critical behaviors using automated tools (Kirkpatrick Partners, 2023d).

**Level 4: Results.** The level 4 evaluation or results of the Kirkpatrick Evaluation Framework should integrate short-term descriptive analytics of targeted training outcomes related to Level 1-reaction, Level 2-learning, and Level 3-behavior (The Training Minute, 2023). It is often predictive sociocultural behaviors, which are not necessarily obtained from the Level 4 evaluation, and many organizations do not know how to collect and apply organizational changes from the data, and special software can be costly (Chirkov, 2020; Minbaeva, 2018). Determining training effectiveness results from data evaluated by a series of formal evaluations can be viewed in dashboards for senior executives (Hart, 2021; Ryan & Deci, 2017).

In this study, I show the empirical findings of learners' lived experience when applying the Kirkpatrick Evaluation Framework after completing a professional development program. Leadership could base the training as a mechanism to achieve the strategic vision for efficiency, advocacy, and education (Maryland Library Association, 2023; Plotinsky, 2023).

### ***Formative and Summative Evaluation***



Evaluations and assessments are often considered the same thing; however, evaluations focus broadly on the beneficial outcomes for all, while assessments focus broadly on the beneficial performance of individuals (Bin Mubayrik, 2020). For this study, I interchange the term assessment with evaluation because of the variety of formal or informal formative and summative measurements. Spencer (2020) defined formative assessment as feedback from self-assessments or peer assessments before, during, or after an activity. Level 1 of the Kirkpatrick Evaluation Framework (KEF) provides immediate quantitative feedback with questions using a Likert scale; it is a precursor measurement for the next two levels of the KEF and serves as the beginning of determining the training need (Andrade et al., 2019; Hauser et al., 2020; Knowles et al., 2020). Level 2 provides qualitative and quantitative data and creates a beginning strategy for resources to achieve the learning goal (Bin Mubayrik, 2020). Level 3 becomes a conversation and a bridge between the learner and manager with descriptive qualitative measurement for behavioral observations (Knowles et al., 2020; The Training Minute, 2023; Tomlinson, 2021). Level 4 becomes a statistical summary or summative assessment of the data from Level 1, Level 2, and Level 3 (Ronan, 2021).

From the definitions of formative-summative assessments, the formative evaluation provides the interaction between the learner and the educator, whereas the summative evaluation provides the grades or statistics (21st Century Classroom, 2019; Andrade et al., 2019). Combining these strategies, not necessarily in contrast, the Kirkpatrick Evaluation Framework uses Level 1 to measure engagement with learner satisfaction and Level 4 to provide statistical information, while Level 2 and Level 3 enhance the interactions or behaviors between the learner, others, and the environment (Alsalamah & Callinan, 2022).

### ***Human Motivation***

Evaluations complement learner-centered training, as in what keeps the learners motivated and encouraged to collaborate their knowledge with their manager and peers in a series of formal evaluations after taking a training course (Tomlinson, 2021;). A series of formal evaluations after training allows the learner to remain engaged over a period, or a continuous metacognitive type of monitoring activity with the potential to increase learner's' growth mindset (Jones, 2020; Raković et al., 2022). An awareness of cognitive load for the importance of coordinating short-term working memory knowledge and problem-solving can determine how much information a learner is able or willing to collaborate (Sweller, 2020). In this study's review of the literature for the human motivation theme, knowledge sharing, cognitive load, public service motivation, collaboration, and growth mindset, I provide the related literature and the foundation for the lived experiences with learners in taking the professional development program about the Kirkpatrick Evaluation Framework.

### **Knowledge Sharing**

Knowledge sharing allows a greater interpretation of why the African American librarians, African American educators, or members of an association with a Black Caucus need to understand the workforce's intrinsic and extrinsic motivation for collaboration, advocacy, education, similar to the Maryland Library Association's Strategic Vision when completing the training evaluation (Maryland Library Association, 2023). Many professional development programs do not provide a formal evaluation at the end of the training; in many cases the formal evaluation is an option that the learner has not taken advantage of to complete after the training. Training primarily has immediate intrinsic motivation for the employee to gain new skills, with the possibility of extrinsic motivation, to stimulate performance and for the learner to receive an incentive (Wijsman et al., 2019). An adult learner can be motivated to share their knowledge

using the Kirkpatrick Evaluation Framework when the need to know benefits their life experiences with reflection and discussions (Aldriwesh et al., 2022; Spencer, 2020). Knowledge sharing in an evaluation has been an outcome of the training when there are tangible rewards to help satisfy the personal commitments (Nguyen et al., 2019).

When completing the evaluation does not appear to have intrinsic value or extrinsic motivation for sharing knowledge, many learners have been unlikely to complete an evaluation. Under valuing the benefits of completing the evaluation can result from miscommunication and misapplication of the critical behaviors desired from the training (Kirkpatrick Partners, 2024f). For example, if the learner does not feel their opinions are valued, then the learner may not have the behavioral motivation for knowledge sharing to contribute information learned or collect additional needed information; the training might be thought of as another day away from the job (Castaneda & Cuellar, 2021; Nguyen et al., 2019). The lack of sharing lived experiences when completing a formal evaluation can affect the organization's development; time and resources could be a wasted invested into the current employee and future learners as strategic human capital who need the skills required for the advancement of new embedded technologies (Liu and Zainuddin, 2021). A lack in assessing learners' outcomes or feedback can have a devastating effect on learners' lived experiences; however, specific, and impactful feedback can create joint problem solving by learner sharing their thoughts about the course content (Kirkpatrick Partner, 2023b; Ryan & Deci, 2017).

For example, three studies researched the motivation of learners for knowledge sharing, or knowledge transfer. In an early study, an online survey completed by 323 members of knowledge-sharing communities found a variance of 40% in knowledge contributing behavior, influenced interpersonal trust being fragile with a lack of frequent interactions, and 44% of

variance in the knowledge collection, with lived experiences significantly affecting contributing and collection behavior (Chen, 2010). In comparison, the systematic review of knowledge sharing in 306 articles published from 1997 to 2020, further research was needed for the best contextual tools to build motivation of knowledge sharing between learners, and between learners and managers (Castaneda & Cuellar, 2021). However, in a meta-analysis of 44 studies involving 14,023 participants from 2000 to 2017, the research found the motivation for knowledge sharing was influenced by individual characteristics, organizational contexts, and sociocultural contents (Nguyen et al., 2019). As related to knowledge sharing, the results from these studies support the need of a series of formal evaluations as a sociocultural learning tool for the interaction of knowledge sharing to gain trust and buy-in between learners, managers, and training coordinators (Kirkpatrick Partners, 2024g). From this study, I would help to satisfy the gap in the literature, to discover if the professional development program would affect learners' lived experiences for knowledge sharing.

### ***Cognitive Load***

When designing any type of multisource evaluation process, the extraneous cognitive load needs to be taken into consideration, because the learner needs to hold the limited working memory knowledge over a period while focusing on other unrelated tasks (Skulmowski & Xu, 2022). Before a learner can store and regurgitate information, it needs to be processed in their working memory (Sweller, 2020). A notable example of implementing cognitive load could be the four levels of the Kirkpatrick Evaluation Framework (KEF). Instead of requesting an evaluation of reaction, learning, and behavior all at the same time to provide immediate results, Dr. Donald Kirkpatrick recommended a phased approach for evaluation-related activities (Kirkpatrick & Kirkpatrick, 2016). To explain the benefits of the four levels of the evaluation,

the online self-paced professional development program provides the evaluation levels in an asynchronous environment, which could explain the sociocultural benefits of the KEF for a greater understanding of the four levels of evaluation as a collaborative, iterative effort, instead of siloed separate evaluation measures (Frechette, 2020). In creating the professional development program, the instruction design was based on a chunking technique to help learners manage their cognitive load or working memory by reducing informational complexity thereby reducing working memory load (Dirksen, 2016; Sweller, 2020). Although there is a sequence of instruction, the learners can voluntarily complete the modules at any time and in any order; there is no requirement to begin at the first module or complete the course in the order presented (Brown & Green, 2020).

A series of formal evaluations after training could keep the learner engaged over a specified timeframe, or a continuous metacognitive type of monitoring activity, keeping the course content effective and learners' performance current and effective; learning does not stop after the training course has ended (Jones, 2020; Raković et al., 2022). Requesting the evaluation information in increments could minimize extraneous cognitive load, also referred to as task-irrelevant cognitive load, which could gradually allow the learner, manager, and training coordinator to assess competency gaps from the knowledge after taking the training and applying the training, which (Eizaguirre et al., 2020; Skulmowski & Xu, 2022).

### ***Public Service Motivation***

Considering public service occupations, such as librarians, educators, or government employees, many learners work in public service professions and participate directly with librarians and library staff with help for researching resources, checking out books, or assisting with the public computers. In a study on motivation of public organizations, one of the

conclusions from Han et al. (2023) found a great amount of attention should be given to motivation based upon the extrinsic needs of the learner; with the socioeconomic changes for different skills and knowledge, which can impact learners' motivation based on cost of living increases. Harari et al. (2017) performed a quantitative meta-analysis on organizational correlates of public service motivation, based on a review of 413 abstracts, 46 studies, and 48 independent samples. Using a cross-sectional survey search of ProQuest and ProQuest Dissertation & Theses for articles containing "Public Service Motivation" or "Public Sector Motivation" published before November 2014, the study was performed with adults and had a zero-order correlation between public service motivation and the selected variables. The independent variables were national context, policymaking, public interest, compassion, and self-sacrifice. The dependent variables were organizational tenure, job satisfaction, organizational commitment, income, advancement, and organizational citizenship behavior. Each study was coded for sample size, correlations, reliability, and moderators, with the reliability of composites and validity of the constructs that had faced significant questions. By collecting data across multiple countries, one limitation from this research found there was not the consideration for the constructs of different sociocultural motivations (Frechette, 2020).

Chen et al. (2019) acknowledged sociocultural behavior changes, here referred to as intrinsic motivations, were left out from their study of public employees' public service motivation with 1,980 participants in four phases of a pre-test and post-test because they did not use all four levels of the Kirkpatrick Evaluation Framework. Han et al., (2023) found it was important to understand the extrinsic motives of public servants. However, in contrast, Mikkelsen et al. (2017) found in a study with 1,190 teachers and 32 school principles that hard, mixed, and soft management sociocultural motivations can decrease employee intrinsic

motivation, and in turn cause a change in extrinsic motivations, such as organizational tenure, job satisfaction, organizational commitment, income, and advancement. Results show the use of extrinsic motivations to enforce employee energy on specific tasks can be necessary and teachers experiencing “hard” evaluations have lower intrinsic motivation than teachers experiencing “soft” evaluations (Mikkelsen et al., 2017). As related to public service motivation, socioeconomic environments, considered in the results from a series of formal evaluations, can make a significant difference in the meaning of constructs for human motivation (Chen et al., 2019; Han et al., 2023).

### ***Collaboration***

Collaboration is the working alliance between the learner, manager, and training coordinator needed for the sociocultural organization change in the evaluation process. The professional development program on a series of formal evaluations changes the sociocultural atmosphere of the organization to a learner-centered or reflective teaching environment by focusing on the following four interdependent areas: the learner, the content, the psychological progress, and the community (Schunk, 2020; Tomlinson, 2021). Creating a standardized evaluation program could be a direct acknowledgment of the Black Caucuses’ attempt to change the sociocultural atmosphere. With the focus on the learners four evaluation levels, the online training about a series of evaluations could endorse a stronger relationship between the learner, the learner’s manager, and the organizational leadership when sharing their knowledge in the evaluations (Graßmann et al., 2020).

There are many research studies on the effect of the Kirkpatrick Evaluation Framework (KEF); however, there is very little research on the lived experiences or sociocultural benefits from a series of formal evaluations to complement the training and why an organization would

use the KEF. With the research from this study, I potentially fill a gap, to validate the KEF's use for performance and organizational impact, especially in the field of social science (Alsalamah & Callinan, 2022; Nguyen et al., 2019). Organizations or associations could develop an evaluation plan specific to learners' training needs. For example, the leadership could initially propose to incorporate the Level 1 results into an executive Dashboard and may propose to incorporate the results addressing the KEFs for Level 2 and Level 3 as more data is retrieved (Kirkpatrick Partners, 2024e). Incorporating the statistical results would be completed in phases because an integrated strategic approach considers technical changes and impacts at various management levels, and to incorporate a shared vision approach with the learner, the learner's manager, and the organizational leadership (Eizaguirre et al., 2020; Gerbec, 2017). As related to collaboration, the professional development program could increase learners' basic understanding of all four levels of the KEF and lived experiences for sharing information after completing training courses and fill the gap for research on the effect with lived experiences after learning about a series of formal evaluation's methodology.

### ***Growth Mindset***

There are three distinct sociocultural outcomes with the growth mindset, which include: individual-level outcomes, supervisor-employee outcomes, and organizational-level outcomes, which are consistent with human resource development practices (Han & Stieha, 2020). With a growth mindset, the learner recognizes training can change their outlook of completing a task and hope to go back to the job with the ability to apply what was learned (Dweck, 2017; Limeri et al., 2020; Mehale et al., 2020). Although organizations recognize training as a valuable factor of human resource development, which can potentially promote a growth mindset, the formal evaluation, which should be able to discern a growth mindset, is usually the first to go with



budget cuts (Langmann & Thomas, 2019). However, formal evaluations as a growth mindset intervention could be preceded by a study, such as this one, which would indicate if the learners had the shared vision for the assessment's purpose (Corradi et al., 2019; Doten-Snitker et al., 2021).

For example, in a meta-analysis study about growth mindset, one of the criteria was to have an intervention, such as an interactive by applying the learned material, to determine if this type of intervention would increase learners' belief of their performance. (Sisk et al., 2018). From 43 studies with intervention from 54,211 participants for interactive (29 studies), the interventions were not effective in classroom activities, very similar to the Level 1 evaluation; however, the effect was significant outside classroom activities, very similar to the Level 3 evaluation (Sisk et al., 2018). In contrast, from a meta-analysis from 26 primary studies with 123 training programs and 1372 participants, a 5-point Likert scale indicated the Level 1 reaction after training was high and the Level 3 behavior 6-weeks afterward for the learner as strategic human capital was high, (Hauser et al., 2020). When comparing the results from 54,211 participants, the Kirkpatrick Evaluation Framework's (KEP) Level 1 evaluation, also known as a smile or happy sheet, from the classroom activities is not as effective to demonstrate a growth mindset as the Level 3 evaluation for behavior of demonstrated activities outside the classroom activities (Hauser et al., 2020; Sisk et al., 2018). However, for a complete analysis, evaluations from both the KEP Level 1 or reaction and Level 3 or behavior are needed to get a full picture of learners' growth mindset from the professional development program (Hauser et al., 2020).

In the absence of a growth mindset is a fixed mindset where the learner does not believe they can learn skills. Without analysis of evaluations, learners can feel rejected with a suggestion for change (Bai et al., 2021; Dweck, 2017). A fixed mindset or single source evaluation can be

perceived as not assessing learners' lived experiences where the learner, manager, and training coordinator can remain stuck in the same way of doing things, and the training programs can become stagnant and unchangeable with stale and outdated knowledge (Kim & Park, 2021). The lack of a growth mindset or use of a formal evaluation conceptually limits a learner to discover their potential or accept the sociocultural feedback to directly affect individual improvement and indirectly affect organizational improvement, while the world around the organization is constantly changing (Dweck, 2017; Eriksson et al., 2020).

The Kirkpatrick Evaluation Framework (KEF) could be an intervention to training, if Level 3 and Level 4 provide the manager's assessment of the learner's application of the training, and data analysis to show the benefits of the training for the organization's development (Campbell et al., 2019). Using the four levels of the KEF as a tool to maximize learners' development could be a new tool, which in turn could create a sound foundation for an organization's results (Alsalamah & Callinan, 2022). Implementing this type of training intervention would align with a growth mindset as a type of human motivation intervention.

### **Educational Technology and Design**

A collaboration between the learner, manager, and training coordinator could drastically change with educational technology (Huang et al., 2019). The Association for Educational Communications and Technology (AECT), defines educational technology as the study and ethical practice of facilitating learning and improving performance by creating, using, and managing appropriate technological processes and resources (AECT, 2008, p. 1). The Universal Design for Learning assists with designing educational technology with intentional planning for learner diversity to facilitate performance with three principles: engagement, action and expression, and representation (Antonenko et al., 2020; Hayward et al., 2022). These three tenets

encourage designing the educational technology for a learner-centered or reflective teaching environment, (Garcia & Lee, 2020; Schunk, 2020). Educational technology could be as simple as providing learners computer access for completing mandatory annual training, viewing a shared PowerPoint presentation in video conferencing technology, or watching a YouTube® video. An e-conference platform and the overhead projector are tools many teachers unknowingly used as educational technology for learner collaboration and motivation in the classroom or on-the-job training. Educational technology can also be more complex, as with massive open online courses (MOOCs), by providing the learner-centered environments with free media tools that include, at a minimum, applications, databases, and websites, which encourages flexible collaboration (Lane et al., 2020; Young & Asino, 2020). In this study's review of the literature for the educational technology and design theme, technology tools, instructional design, human performance technology, scaffolding, and flipped learning, I provide the related literature to the foundation for the lived experiences with learners in taking the professional development program about the Kirkpatrick Evaluation Framework.

### ***Technology Tools***

There is a huge shift in workforce expectations with technology for tools not emphasized in the past, but are used daily, especially in a maximum telework environment (Gale, 2021). For example, addressing the Universal Design for Learning's first tenet of engagement, an office might have the choice to present training in video conferencing technology, or another type of technogenetic or e-conference collaborative platform (Antonenko et al., 2020; Van Manen, 2014). The learner must be able to first access the multimedia, similar to learning a second language, in order to share their real-time appearance, or a photo as the background, or to unmute the audio for speaking at the appropriate time without a long pause (Almusharraf &

Bailey, 2021). Without determining the knowledge gained and only being concerned with the number of hours while the application is open, the cognitive load is undetermined (Sweller, 2020). The advancement of technology has changed the way educators and learners leverage dual visual and audio principles in training programs to stimulate working memory and activate prior knowledge to enhance long-term memory, and thereby create the beginning of a sociocultural learning environment (Antonenko et al., 2020; Frechette, 2020; Oh & Hong; 2020). Through the application of educational technology, the professional development program has the means of improving learners' motivational through visual and auditory instruction with four modules to assist limited working memory in the Thinkific app (Slaughter, n.d.). As a macro-instructional strategy, the training would be used as an option to adapt to the organization's sociocultural learning environment, created with a backward design where the instructor defined learners' organizational gap and developed for a short instruction (Hostetler, K., & Luo, T., 2022).

The learners' willingness for gaining knowledge is based on the sociocultural motivation engagement with the professional development program (Chirkov, 2019). The site of the training course has the potential to explain the complexity of the Kirkpatrick Evaluation Framework (KEF) in layman's terms for organizations or associations that need to implement a series of formal evaluations. The researcher developed the online training based on the 11 psychology principles (American Library Association, 1993):

- 1) Provides the nature of the learning process with the use of an online educational course platform that allows the creation of course content and integrates powerful applications (Oh & Hong, 2020).
- 2) Allows the construction of knowledge as employees to learn and create new

knowledge based on their past experiences (Knowles et al., 2020).

3) Organizes content based on attainment-based and task-centered goals of the learning process (Hadad et al., 2021).

4) Applies higher order thinking with elaborating on the standardized assessment to show the situational complexity (Aldriwesh et al., 2022).

5) Encourages motivation by explaining how the evaluation is valued (Kirkpatrick & Kirkpatrick, 2016).

6) Integrates best practices for information literacy and digital literacy to enhance motivation (Young & Asino, 2020).

7) Promotes self-government for intrinsic motivation with the user's ability to choose which modules to complete (Law et al., 2020).

8) Includes a semi-structured knowledge improvement-referenced assessment, which can be completed with unlimited attempts to provide a snapshot of learning (Shahidullah & Hossain, 2022).

9) Incorporates voluntary participatory consumer-referenced assessments for social environmental diversity (Frechette, 2020).

10) Satisfies the need for relatedness and affirmation of learning (Abadi et al., 2020).

11) Considers individual differences with self-regulated learning in a nonlinear and semi-structured learning environment (Broadbent et al., 2020).

These psychology principles create a learner-centered or inquiry-based approach, where the learner could be motivated to learn and control how they interact with the program and implement solutions, when given the tools necessary to solve the problems (Ferreira et al., 2022). Using new types of multimedia can initially be daunting to the learner, and learning has a

possibility of success and failure (Schunk, 2020). Without a reasonable challenge for achievement or the likelihood of disappointment, the intrinsic and extrinsic motivations can decrease; however, when learners need a reason to continue using the educational environment, mistake-based feedback can be a teachable response to continue striving to learn (Eriksson et al., 2020). Keeping a tolerance for failure in mind, each chapter in the professional development program was developed in a template design, with the same placement for text, pictures, and activity links to engage the learner. After using the working memory to understand the basic layout for any of the modules, the learner can self-regulate their time by following the modules and learning the added content based on their experience (Hadad et al., 2021).

### ***Instructional Design***

When the coronavirus pandemic, known as COVID-19, began in 2020, Italian citizens unknowingly became impromptu instructional designers by singing in unison from their home balconies while quarantined, to help ease the tension of staying 6 feet away from their neighbors, which addresses the Universal Design for Learning's second tenet of action and expression (Antonenko et al., 2020). Organically grown outdoor musicals, beginning as grass-root efforts, encouraged individuals to use their talents as an anchor for relieving stress as impromptu boundaryless careers (Medici et al., 2020). Italians became instructional designers of how to cope with the pandemic in a positive manner, by inadvertently using the five phases of creating instructional training or the ADDIE method: analysis, design, development, implementation, and evaluation.

- Analyzing the problem or identifying a gap,
- Designing a delivery method or the best way to reach the learners,
- Developing the implementation or testing the methods and materials,

- Evaluating the results or determining the impact, and
- Revising the product based on observations or doing it again, where applicable (Johnson-Barlow & Lehnen, 2021; Yeh & Tseng, 2019).

Because the standard way of living had changed, these musical entertainments became educational events with the musicians as impromptu teachers, or instructional designers giving other artists a format to continue their performances without being on a formal stage. The professional development program was created as an organically grown online technology using the ADDIE design to introduce the Kirkpatrick Evaluation Framework. The program may also help the Black Caucuses stay competitive by providing a new learning environment for how learners' lived experiences would affect the sociocultural change for implementing a series of formal evaluations (Dickson-Deane, 2020).

In the same fashion, when the coronavirus pandemic, known as COVID-19, began there was a quick demand for instructional designers to develop virtual courses to increase online instruction and delivery models (Guo et al., 2020; Xie et al., 2021). Instructional designers are not necessarily the subject matter experts (SME) on the course content; however, instructional designers cover a range of people and jobs where there is a curiosity to understand why things are happening and a desire to help the SMEs create engaging training content (Hirumi, 2021). Whether the change is dramatic, systematic, or organic, the instructional designer becomes a special SME who orchestrates the analysis, design, development, and evaluation by working with the SMEs through each phase of the process (Chen & Carliner, 2021). If the results are not as planned, all does not have to be lost as the instructional designer can carry out the five stages in the ADDIE acronym, allowing modifications throughout the process (Yeh & Tseng, 2019). When implementing the Kirkpatrick Evaluation Framework (KEF), the training coordinator may

become an impromptu special SME, who could use the professional development program for action and expression of the KEF benefits to create or redesign evaluations where necessary and encourage the learners and managers to complete a series of formal evaluations (Dickson-Deane, 2020).

For this study, I developed a professional development program about the Kirkpatrick Evaluation Framework for African librarians, African educators, or members of an association with a Black Caucus to experience the beneficial knowledge of a series of formal evaluations. If the organizational leadership should decide to implement a series of formal evaluations, an instructional designer, or a peer-led program could work with leadership to analyze each learners' evaluations, which will help to ensure the course content is useful, and valid (Abadi et al., 2020). These evaluations could potentially be added to learners' learning plan for their job or as a personal attainments inventory. With this study's associated literature, I suggest how creating and implementing the online self-paced professional development program as a resource strategy for a formal evaluation process could assess the organizational leadership's need to improve inequities for African Americans (Agrela de Andrade et al., 2022).

### ***Human Performance Technology***

In many organizations, training programs are part of the human resource department (HR), and the ADDIE methodology can help HR training coordinators develop a technology instructional design model to improve learners' performance (Johnson-Barlow & Lehnen, 2021; Osam & Nold, 2020). Thomas F. Gilbert was considered the father of human performance technology (HPT); however, his wife Marilyn could be considered the mother of HPT, as she worked along with him for more than 20 years and hypothesized the three I's to improve human performance: incentives, information, and instructional design (Driscoll & Burner, 2021; Gilbert,



2019). Robert Mager also recognized the importance of instruction, and suggested performance technology should include instructional technology as a subset relationship, while Joe Harless suggested the analysis of human performance is a front-end solution, allowing the evaluation of a performance problem to find the best solutions (Driscoll & Burner, 2021). Because recent technology innovations give more opportunities for new interpretations, there is not a universal model for HPT (Mavers & Baker, 2021).

The key attributes of ADDIE methodology within instructional technology to analyze, develop, design, implement, and evaluate, and the cyclic ADDIE or the CADDIE model, allow an organization or level of work methodology from human resources, suggest a plausible human performance technology and address the Universal Design for Learning's third tenet of representation (Antonenko et al., 2020; Giacomo & Breman, 2020). There has been a transformation and improvement of terminology, through learning from human error prevention and safety, from human performance improvement to a human performance system, to an organization as a system for coaching and root cause analysis techniques (Marguglio, 2021). With the online self-paced professional development program from this study, I encourage a network between learners' experience with the Kirkpatrick Evaluation Framework and the potential sociocultural development with the manager, and the training coordinator.

With the research and practice of human performance technology (HPT) constantly evolving within instructional design (ID), one might be dependent on the other, emerging differently depending on the situation. Because of this act of blending HPT with ID, the learner should be an integral sociocultural representation of the process for organizational success, as both the practitioner and the researcher, to help address performance gaps with themselves, management, and the training coordinator (Chirkov, 2019; Osam & Nold, 2020). With every

online training course, the learner becomes both the practitioner and the researcher of HPT by completing the formal evaluations with the sociocultural motivation of sharing their knowledge. Jewer et al. (2019) found simulation-based training can be used to teach the learner performance skills, which suggests the professional development program can be an HPT tool to assist in understanding the need for a series of formal evaluations. Therefore, the training course can influence learners' sociocultural work performance with a formal evaluation as an additional learning tool in the human resources tool belt (Mavers and Baker, 2021).

### ***Scaffolding***

Scaffolding initially provides greater assistance with the intrinsic load while minimizing the extrinsic load and then slowly allows for mistake-based feedback (Eriksson et al., 2020; Schunk, 2020). One major aspect of human performance technology is allowing the student to learn at their own pace without feeling direct competition, or the reprimand of the teacher if the student should not perform or excel as quickly as their classmates. Chunking, a supportive aid to scaffolding, where the context acts as a memory aid for the learner to follow the educational material as they choose to achieve an outcome for developing problems solving skills and an expectation for failure (Ghahremani et al., 2021; Kapici et al., 2022; Nückles et al., 2020). A percentage of failure is almost inevitable in all learning environments with progressively difficult challenges, as students need to experiment with the known and unknown and when the outcome is not a grade, but completing a job task (Schmidt & DeSchryver, 2022). Adult learners want to know the why and how of what they are learning in the educational environment and failure can be a teachable response for better learning outcomes (Knowles et al., 2020; Sinha & Kapur, 2021).

To alleviate the fear of failure, providing needed help along the way by scaffolding, or providing the learning in short increments, could be essential for success, whether in the physical classroom or online and allows the learner to determine how much more they want to learn (Dirksen, 2016). For example, ADDIE is an instructional design model that uses five phases as a type of scaffolding that can help the instructional designer move from a novice to expert levels (Johnson-Barlow & Lehnen, 2021). Scaffolding is also similar to collaborative methods in education, where job aids or quick reference aids represent a type of scaffold that focuses on supporting and improving performance in bite-sized chunks or schema building, where there is a connection between the new information and learners' shared experience (Abadi et al., 2020; Taghizadeh & Saadatjoo, 2021). For both the physical and cyber places from a sociocultural learning advantage, scaffolding materials allow learner-centered flexibility and differentiation where the instructor becomes a facilitator (Luckritz Marquis, 2021; Tomlinson, 2021). As a contrast to the advantages, scaffolding can be perceived as a piecemeal type of motivation; it does not demonstrate a systemic vision, with a collective motivating future where all users reach an ultimate end goal at the same time (Schunk, 2020). As related to scaffolding in an asynchronous online learning system, the professional development program has optional linear modules with progression for an end goal where the learner can reflect between their lived experiences compared to the subject content and choose to begin learning in any module (Law et al., 2020). The Kirkpatrick Evaluation Framework offers a type of scaffolding activity where the evaluations build one on another in a required linear pattern (Lane et al., 2019).

### ***Flipped Learning***

A proposed flipped classroom involves blending traditional asynchronous classroom instruction as a precursor to the synchronous group discussion using video conferencing

technology (Fischer & Yang, 2022). With innovations in technological advancements growing rapidly, education and communication methodologies have a multitude of formats to enhance, flip, or even replace traditional classroom settings with digital learning spaces (Halverson et al., 2020). As an example, to fully participate in-class activities, learners must engage in online lectures or resources at their own pace with weekly online collaborative video lessons (Fischer & Yang, 2022; Lee et al., 2022). For the success of the flipped classroom, the instructional designer, in both vocational and technical adult learning settings, should consider the sustainability of new tools and resources across different platforms and devices (Horvitz et al., 2020).

Before the coronavirus pandemic, also known as COVID-19, librarian's and educators as learners preferred face-to-face instruction, opposed to online independent learning (Eichler, 2022). When the COVID-19 began, the Flipped Classroom Model (FCM) method became especially important as instructors had to find ways to deliver their content without directly being in the same physical space as the learners by using synchronous online collaboration tools, such as video conferencing technology. (Fischer & Yang, 2022). Creating content for mobile devices has been found to be more useful than creating content solely for desktop computers for better adaptability (Andujar et al., 2020). The FCM complements using the professional development program by allowing the adult learner to build on their experiences with individual scaffolding before collaborating with their peers with on-the-job life experiences to know the benefits of the formal evaluation (Knowles et al., 2020). For example, a study of 231 science and technology undergraduate students in two 15-week courses found the FCM benefited learner engagement and influenced learner outcomes, where the students first studied from an online learning system,

then completed a quiz before participating in group activities and listening to a lecture (Lee et al., 2022).

However, many learners and instructors have not been educated to use social and multimedia outlets, including artificial intelligence in online environments, to their maximum benefit for educational purposes, because of privacy concerns or learners' fluency with the digital materials (Seo et al., 2021). A study of 197 elementary education preservice teacher undergraduates found that although the instructors can monitor engagement with online textbooks, student engagement may have depended on familiarity with the blended learning format (Hayward et al., 2022). In comparison, Fisher and Yang (2022) found in a study of 54 students the 18 students in a proposed flipped classroom with an online synchronous component outperformed the 18 students in a traditional classroom and the 18 students in a regular flipped classroom. Lee et al. (2019) suggests instructors connect learners' performance and internal motivational needs for effectively blending engagement with educational innovations to improve teaching and learning practice using digital technologies.

Organizations and associations had a greater need for implementing technogenetic professional development programming during the coronavirus pandemic (COVID-19) pandemic, and many organizations were able to use the technology to continue the educational training (Guo et al., 2020). For the online self-paced professional development program, the researcher chose an educational community platform, also known as a learning management system or a massive online open course software (MOOC), because of the variety of templates for the instructor, and the ability for the learner to choose any of the modules (Young & Asino, 2020). The researcher designed the training course as a learning management tool where learners interact with cross-cultural learning, instructional digital information, and communication

technologies, such as videos, online quizzes, and discussion forums (Lane et al., 2020). The added value of using emerging technologies maximizes the collection and processing of learner data which can transcend action-based data in the Web 2.0 environment (Young & Asino, 2020). In this study, I use the flipped classroom format where the learners design their learning in an online asynchronous virtual classroom setting before discussing the sociocultural implications from the training in the focus group also known as the panel discussion, which could be considered as a Kirkpatrick Evaluation Framework's Level 3 assessment.

### **Summary**

The chapter reviews how the current literature could be related to the Kirkpatrick Evaluation Framework and an online self-paced professional development program through the description of three themes: the philosophy of education, human motivation, and educational technology and design, which impact all areas of innovations for evaluations or assessments. Completing the training course could have the ability to keep learners engaged with a series of formal evaluations as a continuous sociocultural, metacognitive type of monitoring activity that potentially increases learners' growth mindset (Jones, 2020; Raković et al., 2022). There is currently a lack of empirical research for learners' lived experiences for filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework (Cariñanos-Ayala et al., 2022; Olsson et al., 2022; Rey-Becerra et al., 2021).

This study could be important for three primary reasons. First, with this study, I could add to the existing body of sources about collective learners' motivation. There is a sociocultural motivation of collaborative groups and the motivation needed for employees to consider the evaluation as continuing professional development (Vázquez-Calatavud et al., 2021). Second,

with this study, I use the proposed flipped classroom method to get learners' feedback by first using the professional development program as asynchronous, also known as self-paced, training, and then have a discussion of the lived experiences on the Kirkpatrick Evaluation Framework's four levels to improve overall learning. The Flipped Classroom Model method became especially important as instructors had to find ways to deliver their content without directly being in the same physical space as the learners by using synchronous online collaboration tools, such as video conferencing technology (Fischer & Yang, 2022). Third, with this study, I explore a shared vision for a change in evaluating training, which could increase participation and show the importance of the learner, manager, and training coordinator working together for success (Doten-Snitker et al., 2021).

If within the organization or association, the learner is not motivated to understand the evaluation as a necessary component of training, then the learner can become disengaged to complete the evaluation (Lane et al., 2020). In conclusion, this research could discover learners' lived experience for filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework as a lived experience applied to the adult learning theory. This lived experience could benefit learners' perspective of completing an evaluation, using educational technology and knowledge sharing as an advocacy method of education to identify learning inequities for African Americans.

## **CHAPTER THREE: METHODS**

### **Overview**

The purpose of this transcendental phenomenology study was to discover learners' lived experiences for filling out a formal evaluation to complete a professional development program about the Kirkpatrick Evaluation Framework for African American librarians and educators who are members of a Black Caucus affiliate group. This research could collectively help the learners and leadership determine the need for applying the Kirkpatrick Evaluation Framework after professional training to address the inadequate outlets for evaluating the development and research of training courses to improve issues relating to the inequities in learning (Agrela de Andrade et al., 2022; Black Caucus of the Maryland Library Association, n.d.; Knowles et al., 2020). The research's purpose, problem, and central research question could provide a foundation for the methods used to obtain the findings and suggest improvements for practice (Creswell & Guetterman, 2019; Creswell & Poth, 2018). In Chapter Three of this study, I present the rationale, researcher's position, procedures, data collection plan, and data analysis for the findings of the problem.

### **Research Design**

Transcendental phenomenology research with an epoché, imaginative variation, and transcendental-phenomenological reduction design can seek to relate lived experiences of how people feel compared to what the experience means (Billups, 2021; Husserl, 1970; Moustakas, 1994). The experiential phenomenon could have the potential of discovering learners' lived experiences when filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework (Knowles et al., 2020; van der Merwe, 2020). Creating a professional development program prepared the learners



for the different transformative experiences from a series of formal evaluations. Transcendental phenomenology's narrative allowed the researcher to discover the perception of reality, in the instance of an online training course (Moustakas,1994).

In this study's qualitative design, I approached the problem from the researcher's interests while experiencing the phenomenon by capturing and analyzing the lived experiences with other librarian's and educator's motivation and knowledge sharing from the professional training while knowing the underlying dynamics for the change allowed a core understanding of the experience, which have not been accessible before to empirical research (Moustakas,1994). In this study, I used three explanatory themes in the related literature to discover the professional development program's influence on the sociocultural learning change for a consistent use of the Kirkpatrick Evaluation Framework's four levels when applying the primary theory (Frechette, 2020; Moustakas,1994).

The journal prompts, focus group, and the researcher's observations attempted to make sense of learners' lived experiences with a naturalistic approach after completing the professional development program (Creswell & Poth, 2018). Using a pattern matching technique, transcendental-phenomenological reduction followed the imaginative variation with the potential to capture and analyze the sociocultural interrelationship, while knowing the underlying dynamics for the change allowed a core understanding of the experience as a real-world societal rival (Creswell & Poth, 2018; Denzin & Lincoln, 2018; Husserl, 1977; Moustakas,1994).

### **Research Questions**

To keep the course content current and effective and the learner motivated, a formal evaluation after training allowed the learner to remain engaged over a period of time as an organized tool for feedback of understanding the course's benefits and challenges while

promoting self-related behaviors (Abadi et al., 2020; Al Shamari, 2022; Jones, 2020; Knowles et al., 2020; Raković et al., 2022). In this study, I developed the research questions about a formal evaluation process from the adult learning theory and proved learners' lived experiences after the preliminary engagement with an online self-paced professional development program (Knowles, 1990; Knowles et al., 2020).

### **Central Research Question**

What are learners' lived experiences for filling out a professional development program's formal evaluation after learning about the Kirkpatrick Evaluation Framework?

### **Sub-Question One**

What happened with learners' lived experiences for determining the need or creating a strategy from an evaluation after completing a professional development program?

### **Sub-Question Two**

What happened with learners' lived experiences for implementing a strategy or assessing the fulfillment from an evaluation after completing a professional developmental program?

### **Setting and Participants**

This transcendental phenomenology study was conducted in a nonprofit setting during the participant's work hours using transcendental-phenomenological reduction to perceive the phenomena in a fresh and open way (Husserl, 1977; Moustakas, 1994). These were desk jobs, where many of the participants had one or several higher-level education degrees and spent most of their time performing tasks using a computer, talking to stakeholders, or attending professional development programs either by technogenetic communications, or in person.

## **Setting**

I initially sent a settings request letter to one Black Caucus Affiliate Group. (See Appendix A.) After one month, I sent the settings request letter to an educational organization and eight associations with a Black Caucus, which combined with more than 42 thousand learners. Because African American librarians, African American educators, and members of an association with a Black Caucus strive for excellence in education, it was possible the learners volunteer as in the library's bookstore, where applicable, and participate in the Maryland Humanities Council's annual One Maryland One Book discussions (Council, 2023). Similar to the nonprofit organization Reading is Fundamental, the African American librarians, African American educators, or members of an association with a Black Caucus were committed to inspiring families and making an impact in marginal communities (RIF, n.d.). The purpose of these learners was to provide an equitable education, leadership training, and to enhance learning and ensure access to information for all (American Library Association, 2023; Kappa Delta Pi, 2024). Four associations with Black Caucus and one education organization approved the setting for this research.

## **Participants**

Participants in this study had defined criteria to be 18 years or older, currently employed or retired in an association that has a Black Caucus or an educator organization, [not managers in their professional career, managers in their professional career, or members who serve on the organization's executive board], and who filled out the formal evaluation(s) after completing the online self-paced professional development program about the Kirkpatrick Evaluation Framework. The multiple population of the participants were learners who were not currently managers, learners who were currently in management, and learners on an Executive Board. From

a qualitative perspective, the defined criteria of unique individuals helped to build a distinct understanding of viewpoints (Creswell & Poth, 2018). Filling out the Level 1 formal evaluation to complete the training course for the Kirkpatrick Evaluation Framework was voluntary. I analyzed the Level 2 evaluation as it was equivalent to the journal prompt for the use in this study. The goal was to reduce the number of participants to 12 with the two-phased approach from the Screening Survey and the quota sampling of candidates who filled out the formal evaluation, with the option to withdraw from the study at any time (Creswell & Guetterman, 2019). I revealed additional demographics information from this study through the Screening Survey. The data from the screening survey was used for analysis to determine participant eligibility.

### **Recruitment Plan**

After receiving the approval from the setting organizations and Liberty University's Institutional Review Board to conduct the study, I sent the learners the recruitment letter, and a follow up recruitment letter, if necessary, as embedded text in an email, which includes a AllCounted, Inc. link to the Screening Survey and an attached consent form to review (See Appendix B, Appendix C, Appendix D, Appendix E, and Appendix F.) All Counted, Inc. is a cloud-based survey tool that helps users create, send, and analyze surveys to improve employee engagement with analytics to help spot trends, create charts, and export professional reports (AllCounted, Inc., 2024). The candidates were selected from a convenience sample pool of approximately 42 thousand librarians and educators who received an association or organizational mailing list. A purposeful sample intentionally found learners who filled out the formal evaluation to complete an online self-paced professional development program (Creswell & Poth, 2018). The recruitment email and follow up recruitment email had a link to the

Screening Survey. (See Appendix F).

The criteria for inclusion in the maximum variation sampling of participants who were 18 years of age or older, African American members of an association with a Black Caucus, who were not managers in their professional career, managers in their professional career, or on the organization's leadership, and have agreed to complete the online self-paced professional development program and the Kirkpatrick Evaluation Framework. I strived for a purposeful sampling from the candidates who filled out the formal evaluations to complete the online self-paced professional development program. Research suggests 5-25 participants were best for a phenomenological study to reach a saturation point where no new concepts were repeated (Creswell & Poth, 2018; Patton, 2015). This two-phased approach was a type of convenience sampling that first collects information on whether the candidates were African American or members of an association with a Black Caucus. The number of participants from a purposeful sampling reduced the number to 10 participants with the two-phased approach from the Completed Screening Surveys and the quota sampling. (See Appendix G). The School of Education Administrative Chair of Doctoral Programs and Research would not accept no fewer than 10 participants without written approval from. The recruitment plan samplings prevent the subjectivity of the researcher and the participants (Olsen, 2018).

I received 27 responses from the convenience sampling, which gave me a sufficient pool of candidates with the potential to sign the consent form, agreeing to complete the journal prompt or Level 2 evaluation, and to participate in the focus group, also known as the panel (Creswell & Guetterman, 2019). These candidates received an email from my Liberty University student account with the Participant Instructions (See Appendix H). The Participant Instructions had links to the Consent Form, and the Benefits of Evaluation (MOOC); Text version, which

included a link to the Journal Prompt (Appendix I, Appendix J, Appendix K). Participants were asked to save a copy of the consent form to their computer, type their name and the date on the form, save the completed form, and return it to me as an emailed attachment before the study procedures begin. The consent form included a disclaimer that all participants will be asked to fill out a Journal Prompt to complete the online professional development program. I kept the completed consent forms on a password protected computer (See Appendix L). The training course had optional activities to keep the students engaged, such as discussion questions, and forums; however, only the data from the journal prompt, or Kirkpatrick Evaluation Framework Level 2 evaluation to complete the training was used for data analysis.

The purposeful sampling included 10 participants who filled out the journal prompt, also known as the Kirkpatrick Evaluation Framework Level 2 evaluation. With this transcendental phenomenology study being conducted with African American librarians, African American educators, or members of an educational organization or association with a Black Caucus, there were many eligible candidates; however, the goal was to reduce the number to 10 with the two-phased approach from the Screening Survey and the quota sampling (Creswell & Poth, 2018). No fewer than 10 participants were accepted without written approval from the School of Education Administrative Chair of Doctoral Programs and Research. From the convenience sample, there were less than twelve participants who were African American librarians, African American educators, or members educational organization or an association with a Black Caucus. After the quota sampling approach, a one-phase quota approach was used to choose participants who completed the Benefits of Evaluation (MOOC); Text Version by filling out the formal evaluation also known as the journal prompt. (See Appendix J and Appendix K).

### **Researcher's Positionality**

I have been a member of the Black Caucus of the American Library Association since 2019, and since May 2022, a member of the Kappa Delta Phi educational organization and the Black Caucus of the Maryland Library Association. Before my retirement in March 2023 from the Federal Aviation Administration (FAA), I had been a member of the National Black Caucus of the Federal Aviation Administration (NBCFAE). In each of these groups, I advocated for the caucus's mission to promote equal opportunities for African Americans, other minorities, women members; improve employee management relations, and provide an effective liaison among members, management, and the community (National Black Caucus of the Federal Aviation Administration, 2024). During my 22 years working at the FAA, I earned my bachelor's degree in organizational management, master's degree in library and information science, and I began pursuing my doctoral degree with an emphasis in Instructional Design and Technology. Each of these advancements was motivated directly by the work I performed. For example, after working with three summer interns and two contractors to convert 13,000 paper records into portable electronic formats (PDF), and then organizing and uploading the PDFs into SharePoint lists and libraries, I had the desire to become a librarian.

While at the Federal Aviation Administration (FAA), I collaborated with other FAA employees, advocated new technologies, and educated on the changing role of librarians researching information in stacks of books to information on the Internet and databases. I created a video titled Librarians are Scientists (Federal Aviation Administration, 2021) for an annual STEM (science, technology, engineering, and math) symposium and developed an online self-paced SharePoint course outlining five basic functions, to help my direct FAA management reduce the number of training dollars spent on SharePoint training (Kirkland, 2017).

Organizations rely on their training courses to ensure their learners have the competencies to do the job (ISTE, 2018). I developed an online self-paced professional development program for learners to understand how the Kirkpatrick Evaluation Framework could be a collaborative training effort and possibly identify inequities in learning.

### **Interpretive Framework**

The learner listens to the words of the educator and watches the actions of the instructor, then internalizes and shares the model behavior (Eizaguirre et al., 2020). Knowles (1990) hypothesized the Kirkpatrick Evaluation Framework conceptualized the andragogical principles of behavioral, cognitive, humanistic, and organizational theories through the process of a series of formal evaluations. The adult educator uses the andragogical principles in the adult learning theory as the culmination of transmitting knowledge through the lived experiences of responsibility and democracy (Vygotsky, 1978).

Adult learners build their understanding of a subject by engaging in activities, with approaches such as active learning, learning through problem-solving, and interactive learning, rather than passively accepting information presented to them (Knowles et al., 2020; Tomljenovic & Talalovic Vorkapic, 2020). It was the integration of community service experience, with classroom-based teaching and learning about responsibility, citizenship, communities of people, and the lived experiences that give the learner motivation to encourage cognitive development (Gururaj et al., 2023). The educator's service, or doing the work, also referred to as walking the talk, and encouraging the service of others has a direct impact on the social responsibility to ensure a democracy to the community, which encourages the student to also become an active participant in the values of education (Vygotsky, 1978).

### ***Philosophical Assumptions***



In this study, I had three philosophical assumptions, as I was open to discovering the holistic lived experiences that the Kirkpatrick Evaluation Framework (KEF) would have on the learner, manager, and training coordinator individually and collectively by applying an integrated educational curriculum (Creswell & Poth, 2018; Howard et al., 2019). Before learning about the KEF, I did not take interest in completing training evaluations, with the thought my evaluation could not add value to my manager, my training coordinator, or my organization.

### ***Ontological Assumption***

My ontological assumption was the multiple realities for offering or completing evaluations (Creswell & Poth, 2018). Evaluations could become an effective way to collect gained knowledge; however, a series of formal evaluations was time-consuming and might not have been cost effective for the organization or association. Although I now put more effort into answering evaluation questions after taking any type of professional development program, I realized the organizations on the surface had been successful with the informal evaluations. Considering my experience, the Kirkpatrick Evaluation Framework could be a transformative structure; however, the informal evaluations could continue to be collected, if a new evaluation structure was not implemented.

### ***Epistemological Assumption***

My epistemological assumption was the learner would be motivated to complete an evaluation after taking the online self-paced professional development program if the learner understood the evaluation benefits. From the information gained while learning about the KEF, I wanted to create online training to increase my knowledge and to help others understand the reason for using a series of formal or multisource evaluations. Sometimes I had a negative emotional reaction to fill out a simple 5 or 10 question Likert-scale type evaluation, when

offered, after completing a professional development program (Wass et al., 2020). If I did complete the evaluation, in an act of reactive nihilism I would quickly mark the same scaled number for each question, to complete the evaluation, without fully reading the questions. After creating the online training for a course project based on the KEF, I gained a transformative lived experience for the potential for sharing knowledge in the evaluation. The role of the educator plays a significant role in the success of the community. There were lived experiences, which the educator passes along, indirectly, and directly, from the instructor to the learner.

### ***Axiological Assumption***

My axiological assumption was if the organizational learners filled out a formal evaluation after completing an online self-paced professional development program explaining the reason behind the evaluation, then there would be a sociocultural shift to ask for an evaluation after taking training (Chirkov, 2020). As an African American librarian, educator, and member of an association with a Black Caucus doing a study on other African American librarian, educators, and members of an association with a Black Caucus, I would be unapologetic about the belief that learners were successful in most things rather than having trouble understanding the subject matter about evaluations. My mother also worked as a school librarian and after developing the evaluation training course, I became empowered to know how learners' opinions could positively impact the African American community.

### ***Biblical Worldview***

Jesus knew the importance of training the Gentiles, and the four Gospels show examples of effective evaluations or memories. This biblical worldview helps to connect to the broader mission of Liberty University by providing Christ-centered knowledge to impact the world (Liberty University, 2024). Matthew, Mark, Luke, and John were present for biblical events, but

none of their accounts or evaluations were a replica from one to the other. The disciples found evidence that motivation and evaluation were justifiably important to the learner's success (Wass et al., 2020). The sociocultural motivation to provide the evaluation shows how people could experience the same situation; however, each assessment shares a few of the same details and then provides a slightly different account. Throughout the Gospels, there were events where the four disciples were witnesses and recorded similar experiences. The disciples wrote their evaluations accommodating a transitory learning process for future generations, based on results from a collaboration of tangible evidence in spiritual formation (Chia, 2020).

These four disciples used their intrinsic motivation for knowledge sharing to spread the good news of the Living Word. Their experiences were a form of activism that had different evaluations or memories, which facilitated a greater understanding of the challenge for communicating to people from diverse backgrounds to value their educational journey as they find balance in common problems and solutions (Muhammad et al., 2020). Applying biblical evidence to the Kirkpatrick Evaluation Framework, could demonstrate how multiple sources of evaluation could be necessary to provide a comprehensive sociocultural determination for the significance or benefit of an event or training course to educate learners as strategic human capital within the body of Christ or the organizational management (Muhammad et al., 2020). Having a series of evaluations or multisource memories from the New Testament disciples helps to increase a Christian's religious lived experiences through a cognitive approach from the multifaceted yet consistent acknowledgment of common goals for connecting people of all Christian denominations (Chia, 2020; Knowles et al., 2020).

## **Researcher's Role**

My role as a human instrument in this study was to observe the interviews, collect the data, and perform the analysis (Chen & Lo, 2019). Developing the professional development program fulfilled a doctoral course requirement; I did not have a supervisory role over the participants. I did not have any biases for the success of the course to be used for anything outside of this research. I did bring the bias that after a participant completes the course, they would have a greater motivation to complete any type of evaluation, just as I experienced, knowing the significance and impact the evaluation can have on an organization. However, this bias did not affect my role as a researcher and to provide an accurate interpretation of the data collection and data analysis. Using epoché, I approached the collected with fresh eyes, setting aside my own understanding and judgements (Moustakas, 1994). As an introvert, I was a particularly good listener to verbal and nonverbal cues, which can be beneficial in interviews. As a reflective writer, I had a history of writing to make the world a better place with the hope of new possibilities (Denzin and Lincoln, 2018). I wrote a memoir (Slaughter, 2002) and transcribed interviews without bias into a book (Slaughter et al., 2019).

## **Procedures**

After receiving the setting approval from one Black Caucus President, I received approval of the manuscript from the Committee Chair and Qualitative Director. After receiving the Committee Chair and Qualitative Director approval, I received Liberty University's Institutional Review Board approval. A pilot study, group of approximately four experts in the field, was not used to assess whether the responses would be a similar reflection to what the researcher needed to complete the study (Billups, 2021).

After receiving approval from Liberty University's Institutional Review Board, I selected

candidates who completed the screening survey and signed the consent form from a convenience sample pool of associations with a Black Caucus and educational organizations. The criteria for inclusion were a maximum variation and then a purposeful sample of learners who filled out and uploaded the formal evaluation to complete the online course Benefits of Evaluation (MOOC), by viewing the computer version, with a mobile app option, or viewing the video titled “Kirkpatrick’s 4 Levels of Evaluation in One Minute” as the CliffsNotes option (Slaughter, n.d; Zeroe Gravity, 2015). Prior to data collection, I chose codes for the participants who completed the consent form to ensure confidentiality and provided the participants with a journal prompt as the first source of data collection. After receiving the journal prompts, I scheduled and audio-recorded the observations from a sixty-five-minute focus group at a designated time in a virtual location determined by the researcher. The focus group was recorded, transcribed verbatim, and member checks validated the data collected. Member checking allowed the participants to verify the interview transcripts and gave them the opportunity to add, delete, or change anything (Creswell & Guetterman, 2019). Data analysis and synthesis was conducted throughout the study from the data collection of journal prompts, focus group transcription, and my observations.

The procedures guided me to stay on course with a timeline of how to complete the dissertation’s study. However, there were times when the dissertation committee had to steer me from following the initial procedures. As a qualitative researcher I was collaborating with humans, and there was expected a margin of error from the original plan. Procedures were constrained by resources, time, and the complexities of human nature, but full of potential for opportunity to succeed (Patton, 2015). From securing the dissertation committee, and gaining approval from the settings, and review boards, the procedures seemed like an arduous journey. Organizing an outline of timeframes for required approvals and data collection was the best way

to begin a qualitative research study (Billups, 2021).

### **Data Collection Plan**

Triangulation of data in qualitative research involved corroborating findings from multiple sources supporting the study (Creswell & Guetterman, 2019; Creswell & Poth, 2018). I used epoché, imaginative variation, and transcendental-phenomenological reduction for multiple data collection methods, which helped to avoid weaknesses or biases in data interpretations (Denzin & Lincoln, 2018; Husserl, 1977; Moustakas, 1994). I used three sources of data in this study, which included journal prompts, focus group, and the researcher's observations. I chose codes for the participants to ensure confidentiality. The journal prompts, also known of the Level 2 evaluation, and my observations helped with a transcendental-phenomenological reduction for examining related data and provide immediate data and help guide the focus group discussion (Husserl, 1970). The focus group, also known as the panel discussion, consisted of a variation of questions from the research questions, asked in plain language, which provide and confirm theory's themes (Creswell & Poth, 2018).

### **Journal Prompt**

The Journal Prompt, also known as the Kirkpatrick Evaluation Framework's (KEF) Level 2 Evaluation was considered a transcendental-phenomenological reduction with the participants (Husserl, 1970). It was optional for the participants to fill out the KEF Level 1 evaluation, because this evaluation has quantitative data. To complete the Benefits of Evaluation (MOOC); Text Version, the participant had to fill out a Journal Prompt or Level 2 Evaluation. (See Appendix J). Within two weeks, I sent a Journal Prompt Reminder Email, where necessary. (See Appendix M). The responses from KEF's Level 1 evaluation were not collected for data analysis. I collected the responses to KEF's Level 2 evaluation for data analysis of this study.

The Journal Prompt allowed the participants to answer opinion questions selected based on motivation as it relates to the adult learning theory and were meant to saturate information about andragogy to fully develop the analysis (Creswell & Poth, 2018; Knowles et al., 2020; Patton, 2015). The participants returned the Completed Journal Prompts to me within a few hours to six weeks as a requirement for completing the Benefits of Evaluation (MOOC); Text Version. (See Appendix J). See Table 2 for Journal Prompt Descriptions.

**Table 2**

*Journal Prompt Descriptions*

Item	Reflective Questions
1	How do you feel about filling out more than one evaluation after completing a professional development program to determine your learning need for achieving a goal? And why? (CQ1)
2	How could an individual or organization use formal evaluations to create a strategy to achieve learning goals? And why? (SQ1)
3	What would be the resources needed to implement either a professional development program resources about the Kirkpatrick Evaluation Framework or a multisource evaluation program? And why? (SQ2)
4	How could the Kirkpatrick Evaluation Framework assess the fulfillment for reaching individual goals, organizational goals change, or the training culture over the next several years? And why? (SQ2)

Filling out the Kirpatrick Evaluation Framework's Level 2, with the journal prompts, and discussing the Level 3 evaluations, with the focus group, after completing the professional development program was the right approach, because it did not take a significant amount of the

participant's time, it gave the participants an opportunity to fill out two evaluations, it allowed the participants to immediately observe their lived experiences from two evaluations, and it did not cause an extreme additional burden to the learner from their regular activities (Kirkpatrick Partners, 2024b). I sent the participants a bi-weekly journal prompt reminder email, if the journal prompt was not received within six weeks after the participant received the link for the online self-paced professional development program (See Appendix M). After I received the Completed Journal Prompts, I scheduled the focus group interview. (See Appendix N).

### **Focus Group**

Within one month after receiving the journal prompts, the focus group, also known as the panel discussion, was considered transcendental-phenomenological reduction with the participants (Husserl, 1970). In qualitative research, focus groups were considered a type of fieldwork, where I observed and asked semi-structured questions about the participant's experiences (Patton, 2015). With increased ethical concerns for capturing data collection through online resources, the focus group allowed for consideration of an easily accessible and comfortable environment for the interviewees (Creswell & Poth, 2018). During the focus group interview, I showed the semi-structured questions in a PowerPoint. (See Appendix O). After the focus group met, I member checked the Completed Focus Group transcript, which the participants responded by email within a one-week timeframe after the interview (See Appendix P). The focus group questions were selected based on the adult learning theory and were meant to saturate information about andragogy to fully develop the analysis (Creswell & Poth, 2018; Knowles et al., 2020).



Questions one through four were noncontroversial questions to get a better description of the participant's picture (Patton, 2015). Question one was a knowledge question as it asks about the participant's factual knowledge about the Kirkpatrick Evaluation Framework before taking the online self-paced professional development program (PDP) (Patton, 2015). Question two was an opinion, where the participant shares their knowledge about previous mandatory or PDFs as they relate to a multisource evaluation (Patton, 2015). The importance of these questions helped to know how the participant values a multisource evaluation after PDPs. Questions three and four were feeling questions because it directly asks for the participant's emotional reaction as it relates to completing a multisource evaluation after completing PDPs and the lived experiences between their manager or the organizational leadership, and for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders (Patton, 2015). If a learner has taken a course they value as benefiting others, it does not mean they had a positive lived experience from the course.

Question five was a follow-up question to allow the participant to share additional thoughts from questions one through six (Patton, 2015). As an impartial observer of an online self-paced professional online development program for a multisource evaluation, this question allows the participant share how to improve the learning (Tomlinson, 2021).

Questions six and seven were feeling questions to ask for the participant's emotional reaction as it relates to a formal evaluation after completing professional development programs and the lived experiences between their manager or the organizational leadership and for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders (Patton, 2015).

Question eight was sensory; it asks how the participants see themselves in the organizational sociocultural change in individual and behavioral communications towards evaluations (Patton, 2015). This question can be important; although a learner might be asked to complete a new or modified different task, they might feel a part of a sociocultural shift in the organization.

Questions nine through twelve were opinion questions because they were directly related to adult learning theory. These questions ask the participant to reflect on if a formal evaluation was offered after completing professional development programs, and the lived experiences, if any, as applied to the learning goal for determining the need, creating a strategy to achieve, assessing the fulfillment of reaching individual and organizational goals, and implementing professional development program resources (Knowles et al., 2020; Patton, 2015). Questions thirteen and fourteen were feeling questions and involve a high degree of vulnerability, as these ask how the participant's emotions towards a time, they had an uncomfortable or a good emotion in knowledge sharing towards completing the evaluation (Patton, 2015). Sometimes a person might not always have a positive response to the evaluation, and they might think the negative response might be linked back to them and impact their professional career. On the other hand, if a learner feels their opinions were valued, sometimes an employee was happy to share the good or the negative impact of the training.

Question fifteen was an experience question as inquiries about the observation of the previous learners' experience environment as learners (Patton, 2015). This question was important because the participant might think implementing the Kirkpatrick Evaluation Framework was a gimmick or a short-lived experience based on past sociocultural environmental changes. Question sixteen was a single final or closing question as the interview might be out of

time and all the questions have not been asked (Patton, 2015). The interview might have a personal atmosphere and go on different tangents indirectly related to the study; this question allows the participant to say anything not discussed, but they feel it was valuable. See Table 3 for Semi-Structured Journal Prompt Questions.

Table 3  
*Semi-structured Focus Group Questions*

Sequence	Question
1.	Experts suggest that organizations often do not complete all four levels of the Kirkpatrick Evaluation Framework after professional development programs. How aware were you of the Kirkpatrick Evaluation Framework before taking the online self-paced professional development program? CRQ
2.	Please tell me the number of professional development programs you have attended that have benefited from an informal or formal evaluation. CRQ
3.	Reflecting on previous professional development programs, what has been your experience, between your manager or the organizational leadership when completing an informal or formal evaluation? CRQ
4.	Reflecting on previous professional development programs, what has been your experience after using an informal or formal evaluation for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders? CRQ
5.	What else would you like to add to your views on taking professional development programs that we have not already discussed? CRQ

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Sequence	Question
6.	Reflecting on the formal evaluations after completing the online self-paced professional development program, what do you believe could be your change of experiences, if any, between your manager or organizational leadership on completing a formal evaluation? CRQ
7.	Reflecting on a formal evaluation after completing professional development programs, whether online or in person, what do you believe could be your change of experiences, for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders? CRQ
8.	Ideally, part of completing a formal evaluation might be a sociocultural change for the Black Caucus. Where do you see yourself in this change? CRQ
9.	Reflecting on if a formal evaluation was offered after completing professional development programs, what do you believe could be your change of experience, for determining professional development programs to achieve organizational goals? SQ1
10.	Reflecting on if a formal evaluation was offered after completing professional development programs, whether online or in person, what do you believe could be your change of experience, for creating a learning strategy to achieve individual or organizational goals? SQ1
11.	Reflecting on if a formal evaluation was offered after completing professional development programs, whether online or in person, what do you believe could

Sequence	Question
	change your experience, for implementing professional development program resources? SQ2
12.	Reflecting on if a formal evaluation was offered after completing professional development programs, what do you believe could be your change of experiences, for assessing the fulfillment of reaching individual and organizational goals? SQ2
13.	When would there be a time that you felt uncomfortable sharing your knowledge about a professional development program? CRQ
14.	Tell me about the time you felt good in sharing your knowledge in your learning experience after completing a professional development program. CRQ
15.	This next question is unique in that it will invite you to look ahead. From your experience of previous improvements to processes, if adopted, how could the Kirkpatrick Evaluation Framework change the training culture within the Black Caucus over the next several years? CRQ
	We have covered a lot of ground in our conversation, and I so appreciate the time you have given to this study. One final question... What else do you think I should have asked about the online self-paced professional development program that I did not ask about? CRQ

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## Observations

During and immediately after receipt of the journal prompts and the focus group transcript, I coded, organized, and explored the data collected for analysis in the Researcher's Journal Prompt Observations and Researcher's Focus Group Observation (Creswell & Guetterman, 2019). (See Appendix Q and Appendix R). When conducting observations from the

focus group, also known as the panel discussion, I developed and included the observations from the journal prompts. I observed a focus group of six participants, for sixty-five minutes as a semi-structured data collection method using audio-recording, between the hours of 9 a.m. through 9 p.m. EST, for transcription (Creswell & Guetterman, 2019). When conducting observations from the focus group, I developed and included the observations from the journal prompts. I scheduled the data collection approach for observations of the journal prompts where I was a non-participant observer for the document analysis while I identified as a participant during the focus group.

See Table 4 for Researcher Observation Descriptions.

Table 4

*Researcher Observation Descriptions*

Item	Researcher Observation Descriptions
1	Participant code
2	Scheduled observation
3	Researcher is non-participant observer
4	Duration of observation
5	General Observation
6	Key words
7	What went well
8	What could have gone better

**Data Analysis**

Data analysis of the journal prompts, the focus group, and researcher observations began when I used epoché, to approach the collected with fresh eyes, setting aside my own

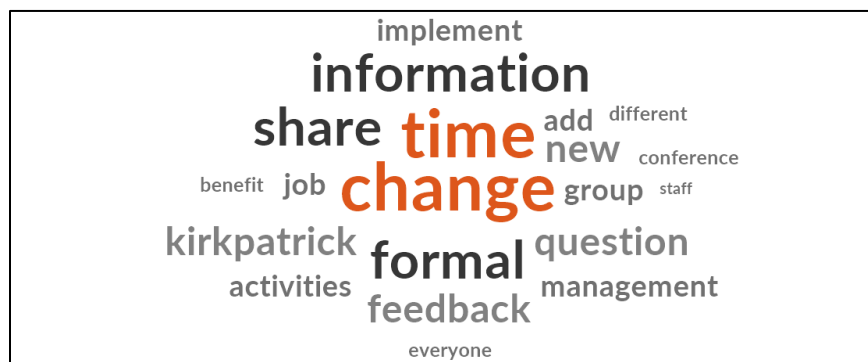
understanding and judgements and using imaginative variation, considering the data from different and creative perspectives (Husserl, 1970; Moustakas, 1994). From the imaginative variation, I developed structural codes for the study's central research question and the sub-questions. Structural codes are words or phrases to help capture, categorize, and organize the data (Saldaña, 2021). The NVivo qualitative data analysis software sorted and tabulated the structural codes frequency to organize the data for textual analysis (Creswell & Poth, 2018; Lumivero, 2024). Textual analysis ensured capturing of the most important ideas (Saldaña, 2021). I combined the structural codes and textual analysis using transcendental-phenomenological reduction, the process to discover the participant's voice (Husserl, 1970). Theme development, attention to the participant's reflections, was the outcome from my qualitative research (Saldaña, 2021).

This first cycle of coding resulted from deductive coding as I used cross-case pattern analysis and compared the categories and clusters of meaning with a relationship to the journal prompts, focus group discussion, my observations, with codes based on the research questions and the key words from the adult learning theory (Patton, 2015; Saldaña, 2021). The codes used were: (CRQ) Required Leadership Buy-In with assess fulfillment, goals, and work; (SQ1) Inspired to Act with determine need, informal evaluation, and make suggestions; and (SQ2) Organized Team with communication, create strategy, and implement strategy. All information was placed accordingly by pattern matching and explanation building, by using imaginative variation to grasp the structural codes of the experience, and then transcendental-phenomenology reduction for each experience to be considered by itself (Creswell & Poth, 2018; Husserl, 1977; Moustakas, 1994).

The second cycle of coding resulted from pattern coding by grouping the files into condensed concepts for theme development (Saldaña, 2021). I used the NVivo qualitative data analysis software to sort, tabulate the frequency, and to organize the data for qualitative data analysis by combining the structural analysis of the imaginative variation with the analysis essences for the transcendental-phenomenological reduction. After a query of the top 20 words, The NVivo software rapidly coded and created word comparisons (Creswell & Guetterman, 2019; Lumivero, 2024). From the NVivo textual analysis, I downloaded a word cloud of the top 20 word frequencies. See Figure 2 for Top 20 Word Frequency Query.

## Figure 2

### *Top 20 Word Frequency Query*



### **Trustworthiness**

Lincoln and Guba (1985) responded to criticism from positivists about a perceived lack of rigor, reliability, and objectivity by conceptualizing parallel terms for these characteristics of qualitative research, specifically, credibility, transferability, dependability, and confirmability. This section describes the measures taken to assure a rigorous study through the lens prescribed by Lincoln and Guba. While these terms were, in many cases, synonyms for terms used in quantitative scholarship, these have different meanings and implications for the quality and rigor of a qualitative study.



## **Credibility**

Credibility refers to the extent to which the study's findings accurately describe reality, at least according to the perceptions of participants, as a proximation of the truth of the phenomenon in question (Lincoln & Guba, 1985). I achieved credibility in three ways: (a) triangulation, (b) peer debriefing, and (c) member-checking.

### ***Triangulation***

In this study, I undertook triangulation of qualitative methods, data collection methods, sources, and theories to explore the stories told by African American librarians and educators about their success. The methods I included were aspects of written familiarity and narrative inquiry as a hybrid method created for this study in which I did not seek the entire life history of the learners but their reflections from their experiences in evaluations. In this study, I took up the role of narrator for the librarian and educator's stories as the participants may not be prepared to tell their own stories, (Muhammad et al., 2020). I achieved data collection methods triangulation with journal prompts, a focus group interview, and my observations. I achieved source triangulation with the online self-paced professional development program combined with Kirkpatrick's Evaluation Framework Level 1 evaluation as an optional exercise, the Level 2 evaluation as the journal prompt, and the Level 3 evaluation from the focus group discussion (Kirkpatrick Partners, 2024b). I achieved theory triangulation using the adult learning theory as both organizing and analysis of data, social exchange theory with cohesiveness and interaction, and the cognitive load theory with working memory (Homans, 1958; Knowles et al., 2020; Sweller, 2020).

### ***Peer Debriefing***

A technique I frequently used during this study was peer debriefing (Marshall &

Rossman, 2015) which allowed me to discuss emergent findings with colleagues to ensure my analyses were grounded in the data. Ideally, I would have had librarians and educator's triangulate results during this study through peer debriefing, but I did not have ready access to those kinds of peers. Still, there was some data available in the modest literature that provided some corroboration for my findings, in addition to peers in my related associations who were familiar enough with my research to provide important perspectives that helped elucidate my study's findings.

### ***Member Checking***

Having undergone many of the same experiences and transitions myself that librarians and educators experience when filling out an evaluation before, during, and after taking professional development programs gave me an insider's connection with my participants (Rossman & Rallis, 2016). This insider's, or *emic* perspective, which Rossman and Rallis (2016) suggest can be an advantage for researchers, allowed me to reflect back the meaning of the participants' words during the interviews; this immediate member checking (Lincoln & Guba, 1985) was important because, during the panel discussion, I confirmed some concepts by asking questions from various perspectives to ensure I captured the analysis of an experience. After transcription, I clarified specific elements of data with the participants, thus ensuring I accurately reflected their stories of success, which can also serve as member checking (Lincoln & Guba, 1985). Still, I was wary of falling into the trap of believing that I automatically understood what participants meant and forced myself to explain some concepts in participants' words that I believed I already understood. For further member checking, I provided willing participants with a copy of the focus group transcript, which they reviewed for accuracy.

**Transferability**

Transferability shows that the findings may have applicability in other contexts (Lincoln & Guba, 1985), which was largely achieved using thick descriptions when describing research findings (Geertz, 1973). The descriptions I used to describe the experiences of African American librarians, African American educators, or members of an associations with a Black Caucus, painted a robust picture of what success in filling out an evaluation after completing a professional development program meant for my participants. The alignment of participant testimony across these several institutions was so similar as to suggest that the specific context of a multisource evaluation may not be the primary factor in what contributes to librarian and educator success. While a single institution of each type does not necessarily facilitate the transferability of findings, the literature offers virtually no insights into factors influencing librarian or educator attainment for filling out an evaluation; from this study I offer an exploratory first step toward an improved understanding the success for librarians, educators, or members of an association with a Black Caucus after completing a professional development program.

**Dependability**

Dependability shows that the findings were consistent and could be repeated (Lincoln & Guba, 1985). Descriptions of my procedures, particularly the adaptation of the study once I discovered the significance of the success influencer, were comprehensive enough that this study could be replicated. Specifically, descriptions of the method I developed to undertake this study were straightforward and supported by the literature, in addition to being fairly simple enough to repeat for student veterans, but this study could be replicated for any population. My committee thoroughly reviewed these procedures and deemed them sufficient to demonstrate mastery of the

method as I designed it.

Descriptions of my procedures, particularly the adaptation of the study once I discovered the significance of the learner's sociocultural motivations for knowledge sharing, were comprehensive enough that this study could be replicated (Chirkov, 2020). Specifically, descriptions of the method I developed to undertake this study were straightforward and supported by literature, in addition to being simple enough to repeat for student veterans, but any population could replicate this study. My committee thoroughly reviewed these procedures and deemed them sufficient to demonstrate understanding of the method as I designed it.

Dependability was necessary, because when collaborating with humans there can be multiple realities and the realities were influenced by the context of the research (Lincoln & Guba, 1986).

### **Confirmability**

Confirmability is a degree of neutrality or the extent to which the findings of a study are shaped by the respondents and not researcher bias, motivation, or interest (Lincoln & Guba, 1985). Techniques for establishing confirmability include: (a) confirmability audits; (b) audit trails; (c) triangulation; and (d) reflexivity. I employed these techniques to ensure the confirmability of this study. First, I created confirmability audits and a detailed audit trail through which my procedures, raw data, analyzed data, and the final report could be transparently tracked if necessary. Second, I employed the numerous aspects of triangulation described above, and finally, I was reflexive in the undertaking of this study. Reflexivity was an attitude of attending systematically to the context of knowledge construction, especially to the effect of the researcher, at every step of the research process (Cohen & Crabtree, 2006). To achieve reflexivity, my journal prompt and focus group interview observations incorporated a reflexive journal of sorts. Memoing in this way helped to bracket my bias in this study, which

was not difficult as my undergraduate experience was not as a librarian nor as an educator, so I merely had to bracket my perspectives that librarians and educators were generally successful and open to contributing factors to their success. I included the voices of these influencers and had no preconceived notion of the contribution of the success influencers.

### **Ethical Considerations**

Ethical considerations can arise during any phase of the procedures of qualitative research, including getting Institutional Review Board recommendations, disclosing the purpose of the study to candidates or participants, and storing data inappropriately (Creswell & Poth, 2018). As a researcher, librarian, educator, and member of the several Black Caucuses, governmentality for myself and the researcher's population must be constructed as an ethical social science (Cannella & Lincoln, 2018). And because the research involves humans, each participant had the right to know that voluntary participation means they can drop out of the study at any time, and if they decided to continue there would be confidentiality in the treatment of their responses (Billups, 2021). Ethical consideration meant to address each person uniquely, without personal bias or influence from the interviews of other participants (Van Manen, 2014). The storage of participant permissions, study procedures, data collection, and data analysis in a secure location was also considered while thinking about ethics, whether the data was in electronic or paper format (Creswell & Poth, 2018).

### ***Permissions***

The procedures began with attaining the setting permission. First, I emailed a setting request and approval letter, as either a portable document format (PDF) attachment with an electronic signature field, or embedded in the email, to several organizations, associations, and affiliate Black Caucus Presidents or Chairs for setting approval to conduct a study to conduct

research. (See Appendix A). After receiving setting approval from the organization, association, or affiliate Black Caucus President, I received my Committee's Approved Defense Decision. (See Appendix B). After receiving the setting approval and Director's approval, I uploaded and received approval from an Institutional Review Board (IRB) application into Liberty University's (LU) Research Administration Software Cayuse® for the Committee Chair to review, approve, and forwarded the application to LU's IRB for permission to conduct the study (Liberty University, 2024). (See Appendix C).

### ***Other Participant Protections***

The participants were selected from those who have signed a consent form; however, because the participants were volunteers, they could withdraw from the study at any time, and for all withdrawals, the data collected will be deleted. I chose codes for the participants to ensure confidentiality. I kept the data collected on a password protected computer and will delete the data after three years. If I expected the participants to be ethical in their responses, then the participants should expect the same ethical behavior from me, my methods, the setting, and the data analysis; in fact, I honestly reported the different perspectives while using composite stories in sharing the results (Creswell & Poth, 2018).

### **Summary**

In this transcendental phenomenology study, I found success with the data collection, trustworthiness, and ethical considerations with the learner's lived experiences for filling out a professional development program's formal evaluation after learning about the Kirkpatrick Evaluation Framework. I took part in an arduous journey when designing the study, thinking of the research questions, determining the best setting, sampling the participants to join the study, developing the procedures for execution, and ensuring trustworthiness. However, the act of

planning the journal prompt, focus group questions, memoing observations, and analyzing the data enabled an appreciation from the act of observing and recording the emerging phenomenon for the qualitative quest (Billups, 2021; Denzin & Lincoln, 2018; Husserl, 1970; Moustakas, 1994).

## **CHAPTER FOUR: FINDINGS**

### **Overview**

The purpose of this transcendental phenomenology study was to discover the learner's lived experiences for filling out a formal evaluation to complete a professional development program about the Kirkpatrick Evaluation Framework for African American librarians and educators who are members of a Black Caucus affiliate group. This chapter includes participant descriptions; the data in the form of narrative themes and a table presented by theme; outlier data; and research question responses. Based on the data collected, I identified themes and subthemes that address the main research question of this study. The data analysis yielded the following themes: (CRQ) Kirkpatrick Framework Addresses Strategy with the subthemes of Different Levels Need Different Questions and Everyone Benefits from Feedback; (SQ1) Feedback Could Assist with Change, with subthemes of Formal Evaluations from Management and Feedback from Conference Activities, (SQ2) Implementing Strategy Needs Time, with subthemes of Sharing Information with Staff and New Group and Training Culture. There were also two findings of outlier data. Through the descriptions of learners' lived experiences from filling out an evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework, I found themes emerged, and learners' responses answered the research questions of this study. Finally, this chapter concludes with the answers derived from the research questions and a summation of the chapter.

### **Participants**

From the 27 candidates who completed the 11-question screening survey, ten participants satisfied the purposeful sample by completing the online asynchronous professional development program. These ten participants were all African American. Nine participants were members of



an association with a Black Caucus, while one participant was not a member of an association with a Black Caucus. Four participants were employed or retired and not managers in their professional career. Five participants were employed or retired and a manager in their professional career. One participant was employed or retired on an Executive Board. Nine participants identified as female, and one participant identified as male. From the focus group, also known as the panel discussion, there were seven African American female participants to include the researcher. With this transcendental phenomenology study being conducted with African American librarians, African American educators, or members of an association with a Black Caucus, there were many eligible candidates; however, the goal was to reduce the number to 10 of participants with the two-phased approach from the Screening Survey and the quota sampling (Creswell & Poth, 2018). See Table 5 for a list of Participant Demographics.

**Table 5**

*Participant Demographics*

Participants	Black Caucus		Gender		Learner Type		
	Member	Not a Member	Male	Female	Not a Manager	Manager	On Executive Board
Rebecca	1	2	2	1	1	2	2
Michelle	1	2	2	1	2	2	1
Pam	1	2	2	1	1	2	2
Denise	1	2	2	1	1	2	2
Karen	1	2	2	1	1	1	2
Alana	1	2	2	1	1	2	2
Barbara	2	1	2	1	2	1	2
Sandra	1	2	2	1	2	1	2

Participants	Black Caucus		Gender		Learner Type		
	Member	Not a Member	Male	Female	Not a Manager	Manager	On Executive Board
Vanessa	1	2	2	1	2	1	2
James	1	2	1	2	2	1	2
Total	9	1	1	9	4	5	1

Note: In Table 5, the number 1 represents yes, and the number 2 represents No.

### **Rebecca**

As a Black Caucus member and not a manager in her profession, Rebecca would not mind completing more than one evaluation. However, in response to the journal prompt question about how do you feel about filling out more than one evaluation after completing a professional development program to determine your learning need for achieving a goal, Rebecca reflected, “I know the model explains checking in more deeply in 3-6 months, but if there isn't any work done in between, I would definitely need a refresher.” Rebecca filled out the Level 2 evaluation within five calendar days after completing the screening survey, which included a winter holiday weekend.

### **Michelle**

As a Black Caucus member of an Executive Board, Michelle would agree to complete a second evaluation for more feedback. In response to the journal prompt question about how do you feel about filling out more than one evaluation after completing a professional development program to determine your learning need for achieving a goal, Michelle reflected, “... completing an initial evaluation is easy but a 2nd one, sometime after the initial course, and with more open-ended questions is more time intensive.” She posted a discussion comment: Evaluations help the presenter improve the presentation and understand what the learner found to

be most important. Evaluations help the learners to focus and encourage the learner to apply what they learned. Michelle filled out the Level 2 evaluation within five business days after completing the screening survey and showed an interest in the study for professional reasons.

### **Pam**

As a Black Caucus member and not a manager in her profession, Pam would be open to more than one evaluation. In response to the journal prompt about what would be the resources needed to implement either a professional development program resources about the Kirkpatrick Evaluation Framework or a multisource evaluation program, Pam reflected, "Evaluations can be questions specific to the material, or an iterative approach to make sure the learners are retaining and are confident to apply the material as they move through the lessons. The organization can apply the data to meet the learners as they are if needed." Challenged with winter holiday season and taking time for vacation, Pam showed great determination and was the 10<sup>th</sup> participant to fill out the Level 2 evaluation approximately 75 days after completing the screening survey.

### **Denise**

As a Black Caucus member and not a manager in her profession, was open to more than one evaluation, knowing the Framework could be beneficial to the learner and incorporated to benefit the organization. From the focus group discussion, when asked to reflect on your experience after using an informal or formal evaluation for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders, Denise reflected, "I have taken some things outside of my organization and done conference presentations, even something as simple as a lightning talk, with five minutes or so to a full-blown conference proposal presentation." With the winter holidays and vacation, Denise filled out the Level 2 evaluation approximately 60 days after completing the screening survey.

**Karen**

As a Black Caucus member and a manager in her profession, Karen reflected she would refuse to complete more than evaluation if not given the reason for the additional evaluations. However, after reviewing the professional development program, she wrote she would be less annoyed to complete the Level 2 and Level 3 evaluation of the Framework. In response to the journal prompt about how could an individual or organization use formal evaluations to create a strategy to achieve learning goals, Karen reflected, “The level 2 evaluation allows the individual to explain what they have learned. This information can help organizations work to achieve their learning goals by utilizing the data received in feedback to make the changes necessary to reach their desired outcome.” Karen filled out the Level 2 evaluation within 30 days after completing the screening survey and experienced the Framework could change the level of investment by learners and help organizational achieve real change if applied equitably.

**Alana**

As a Black Caucus member and not a manager in her profession, Alana thought she would lose motivation with more than one evaluation, regardless of what was learned. She was the first to use the professional development program’s mobile app. From the focus group discussion, when asked if they ever felt uncomfortable sharing knowledge from a professional development program, Alana reflected, “I have never felt uncomfortable, but I will say I have been to professional developments where I thought it was good, but I know if I brought it back to management, it would fall on me to implement the changes.” The Level 2 evaluation was not doable in the app and she had to upload on a personal computer. Alana filled out the Level 2 evaluation within 30 days after completing the screening survey.

**Barbara**

Barbara was not a member of an association with a Black Caucus; however, she was manager in her profession. She faced challenges uploading the Level 2 evaluation into the Thinkific app as a portable document format (PDF); yet she was able to upload a jpeg of the evaluation, which showed a willingness to learn different methods to accomplish the task. In response to the journal prompt question about how could the Kirkpatrick Evaluation Framework assess the fulfillment for reaching individual goals, organizational goals change, or the training culture over the next several years, Barbara reflected, “The style of observation and data is not as standard, so the Kirkpatrick Evaluation Framework gives options to different learning strategies.” Barbara filled out the Level 2 evaluation within 30 days after completing the screening survey.

**Sandra**

As a member of a Black Caucus and a manager in her profession, Sandra experienced evaluations as a waste of time because the organization requesting the evaluation would probably not read it. In response to the journal prompt question about how could an individual or organization use formal evaluations to create a strategy to achieve learning goals, Sandra reflected, “It can be used to improve their learning goals by assessing where their gaps of communication may be.” Sandra filled out the Level 2 evaluation within one day after completing the screening survey, without reading the professional development program modules; however, she was able to provide constructive responses.

**Vanessa**

As a member of a Black Caucus and a manager in her profession, Vanessa thought one evaluation with a mix of multiple-choice and open-ended questions was preferable. In response

to the focus group question, about what do you believe could be the change of experiences for ensuring current and future generations have the appropriate knowledge, skills, and abilities, Vanessa reflected, “ ... I am sort of using this, not a formal process at this point, but using it as a way for empowerment, encouraging the people that I work with to take control of their area to help guide the organization.” She filled out the Level 2 evaluation by watching the video CliffsNotes version.

### **James**

As a member of a Black Caucus and a manager in his profession, James thought several evaluations can provide a crucial component for showing the effectiveness of the learner completing the goal. He used the cliff notes version and was able to comprehend the benefits of the Framework just as well as someone who had read the entire professional development program. In response to the journal prompt question about how do you feel about filling out more than one evaluation after completing a professional development program to determine your learning need for achieving a goal, James reflected, “I prefer to fill out multiple evaluations after completing a professional development program. I think the evaluation process is a crucial component in determining how effective the program was at helping me reach my goal.” James filled out the Level 2 evaluation within one hour after completing the screening survey.

## **Results**

This section of Chapter Four presents the study’s findings and results. I generated the themes and subthemes from the journal prompts, focus group discussion, and my observations. The results prepared me to form a summary of the findings and conclude the research with implications and gaps for future research in Chapter Five. I categorized the data collection into

themes and subthemes in the table below, then compared results to literature review and narratively analyzed the data. (Saldaña, 2021). See Table 6 for Themes & Subthemes.

**Table 6**

*Themes & Subthemes*

Themes	Subthemes	Subthemes
(CRQ) Kirkpatrick Framework	Different Levels Need	Everyone Benefits
Addresses Strategy	Different Questions	from Feedback
(SQ1) Feedback Could	Formal Evaluations	Feedback from
Assist with Change	from Management	Conference Activities
(SQ2) Implementing Strategy	Share Information	New Group and
Needs Time	with Staff	Training Culture

**Kirkpatrick Evaluation Addresses Strategy**

Elements of *kirkpatrick* and *add* appeared across all three sources of data for most participants. Elements of *different* and *questions* were clustered to form the first sub-theme. Elements of *everyone* and *benefit* were clustered to form the second sub-theme. In total, these words appeared 487 times in participant journal prompts, the focus group transcript, and researcher's observations. Overall, I observed the participants learned the Kirkpatrick Evaluation Framework could address learning strategies.

From the journal prompts, when asked how could an individual or organization use formal evaluations to create a strategy to achieve learning goals, six participants provided specific examples. Rebecca wrote, "You can use this as a benchmark to check in based on how the individual or group answers the questions. You could also ask people what obstacles were in the way of them achieving the learning goals." Pam reflected,

“These evaluations can help organizations discover and evaluate what their audience knows and wants to know. This will help ensure that learning goals are focused, achievable, and meaningful.” Although Sandra thought evaluations are a “waste of time because I do not think the person giving the evaluation will actually read it” she acknowledged, “It can be used to improve their learning goals by assess where their gaps of communication may be.” James stated, “I prefer to fill out multiple evaluations after completing a professional development program. I think the evaluation process is a crucial component in determining how effective the program was at helping me reach my goal.” Denise reflected, “Once recognized as a safe harbor, members and or person/teams can respectively collaborate to address issues, identify, and communicate strategies that align with the organization's goals and measure their effectiveness.” Michelle mentioned, “The evaluations assess fulfillment of what the learner has learned from the training and manager behavior observations, which will benefit the organization return on investment.” Karen wrote, “This information can help organizations work to achieve their learning goals by utilizing the data received in feedback to make the changes necessary to reach their desired outcome.”

### ***Different Levels Need Different Questions***

Each of the Kirkpatrick Evaluation Framework’s three levels of evaluation address the need for different types of questions with the combined results to be beneficial for achieving goals. I observed the participants provided more in-depth responds to the different types of questions from the focus group discussion, or Level 3 evaluation, with a productive and engaging conversation, which would not have been available with individual written journal prompts, or Level 2 evaluations. From the journal prompts, Barbara reflected, “I feel it’s appropriate to fill



out more than one evaluation. You can expose different learning skills looking back over them.” Rebecca stated, “If the result isn't what was expected, then going back and re-teaching the group or individuals would be done in a different way and then this data would be evaluated.”

From the focus group transcript, when Denise mentioned, “Leaders, sometimes manager, may not know how or they may not know what they want from you and other employees than giving you something to do” Rebecca concurred, “The previous participant’s comments resonated with me regarding the idea of professional development as busy work.”

### ***Everyone Benefits from Feedback***

With Kirkpatrick’s different questions addressing the learning strategy, everyone benefits from the feedback. I observed five of the six focus group participants had not heard of the Kirkpatrick Evaluation Framework before this study, and five had an optimistic outlook that the formal feedback could change the training culture, if adopted. From the focus group transcript, Denise found encouraging feedback after training,

It’s encouraging them to do the research, come back, ask questions as needed, and then go back and hash it out and come up with a recommendation that empowers them to go to the next step. It’s not formal in that it’s written, but it gives them the experience or opportunity to make decisions and move the organization ahead.

Vanessa said, “I find with professional development, it could be really rewarding as a prior speaker just said, but if you don’t have time to nurture and try to implement what you learn, it just goes back to the everyday routine.” Karen reflected, “Some did not want to touch certain things in technology, but we needed to be able to move everybody forward so everyone could participate.” Rebecca mentioned, “I will say that the informal sessions could have benefited more from evaluations because I don’t think that those trainers were often the best, but if they

knew how to get better then maybe people would have a better time remembering what we were taught.”

From the journal prompts, Alana wrote, “Kirkpatrick’s evaluation framework can impact a sociocultural change because it helps evaluate what you learned and how it has changed your behaviors.” Pam stated, “Using this framework can help an organization move from being led from the top to being led by all. The framework allows individuals at all levels to provide feedback and leadership can use the data to inform future work.”

### **Feedback Could Assist with Change**

Elements of *feedback* and *change* appeared across journal prompts and focus group transcript for most participants. Elements of *formal* and *management* were clustered to form the first sub-theme. Elements of *conference* and *activities* were clustered to form the second sub-theme. In total, these words appeared 434 times in participant journal prompts, focus group transcript, and researcher observations. From the journal prompts and the focus group transcript responses, I observed all participants experienced feedback from a formal evaluation could determine the learning need for achieving a goal or assist in implementing a learning strategy. From the journal prompts, Karen stated, “I believe this type of evaluation provides an accountability framework that supports sociocultural change by negating individuals and organization’s ability to engage in performative of superficial change measures.” Rebecca wrote, “The evaluations can build on the iterative approach that makes sure participants are retaining and applying their knowledge, and the folks assessing the responses use the feedback to change to meet the group at their level.” Pam revealed, “Completing an evaluation after some time allows me to evaluate how I feel about the programming now that I have completed it and moved back into my daily routine.” Sandra suggested, “It could help establish what needs to be done to

improve learning strategy. This is important so organizations could improve to help their organizations grow.” Alana indicated, “Formal evaluations help to expose your weaknesses which helps with growth. Sometimes it’s good to see yourself through another person’s perception.” Barbara reflected, “The Evaluation Framework can be very useful. Being as though it gives different options and choices. It brings forth diversity to the different strategies that can be used.” James stated, “The goal is that the feedback provided in the evaluation form, will assist with refining the program to cater to individuals that have learning and comprehension styles similar to mine.”

From the focus group transcript, Vanessa responded, “The formal evaluation is a good thing, and I would be totally for it. Pushing this to let us do these formal evaluations so that people are not wasting their time doing professional development that may not benefit them.” Denise mentioned, “I am open to completing more than one evaluation, especially if I know the professional development program is being incorporated into my organization and will be an ongoing benefit to my organization.” Michelle thought, “A sociocultural change would occur when leaders intentionally collect, analyze the data, reacts and adjust learning strategies accordingly.”

### ***Formal Evaluations from Management***

I observed four participants, from the focus group transcript, reflected they did not find a benefit from their previous formal evaluations initiated by management. Rebecca reflected, “My point is how are some people learning important skills, but others are not, and how is upper management being consistent? It was giving mixed signals.” Denise indicated, “But at some point, I got almost cynical in life that sometimes we must find a way to make it work. Leaders, sometimes managers, may not know how or they may not know what they want from you and

other employees than giving you something to do.” Alana responded, “I complete the evaluations just to do it because I usually just give them the best ratings. There is no outcome. That’s why I tend to, when I do the surveys afterward, to just rate well because I just feel like it’s not going to change.” Karen exposed, “I have been on both sides of it as the person hosting the training and a lot of times really the evaluation is like a check mark that people attended.” However, James reflected positively on the future benefit of formal evaluations initiated by management, “Organizations can take the feedback provided on the evaluation forms, exact the responses to create long term strategies to enhance learning goals and processes that will drive better results.”

### ***Feedback from Conference Activities***

I observed from the journal prompt and focus group transcript, the participants experienced formal evaluations may not promote change; however, after attending training, learners can provide informal feedback in lieu of formal evaluations from management. When asked for the participants to provide their reflection from the focus group transcript, three participants gave specific examples about how information from conference activities generated change for their peers. Denise stated, “I said all the people that I work with may never have the opportunity that I am having of traveling and going to these activities. I put my report almost in the form of a newsletter.” And she would also, “... put the conference book out so they could go through and see some of the different activities, but just being able to share the resources that I had stimulated conversation and interest.” Michelle reflected,

When you go to large conferences and there are so many different things to choose from, not everybody can go to the same thing. We did share informally as a group, not through management or anything particular, but decided that we did want to meet and just talk about any of the various things that we learned.

Rebecca stated, “At my new job, I went to a conference and we’re moving quickly on some things a colleague and I learned there. It’s a big change from some past places where they didn’t really support you in trying what you learned.”

### **Implementing Strategy Needs Time**

Elements of *implement*, *need*, and *time* appeared across all three sources of data for most participants. Elements of *share and information* were clustered to form the first sub-theme. Elements of *new* and *group* were clustered to form the second sub-theme. In total, these words appeared 720 times in participant journal prompts, focus group transcript, and researcher’s observations. I observed the element of time proved to be a very important factor as to who would implement the organization strategy. From the focus group transcript, Denise reflected, “I also attended a workshop many, many years ago put on by the Kellogg Foundation and they said it takes five to seven years to move an idea.” Michelle replied about the formal evaluations, “You do need time to read them, to absorb them, to react to the feedback and reacting to the feedback and making some kinds of adjustments.”

I asked an ad hoc question based on whether the participants noticed that you and others just continue doing things as they have been doing. Rebecca summarized the discussion by adding, “I’m sensing a theme that things move slowly and sometimes people are overburdened even though we are inspired to take action on what we’ve learned.”

### ***Sharing Information with Staff***

I observed implementing change in advance of fulfilling a strategy, could be as simple as taking the time to share information with others. Based on the focus group discussion, I clarified question two for the participants to reflect did you have any conversations with your manager or their organizational leadership or did you see anything different from informal or formal

evaluations? I observed pros and cons responses for sharing information from five participants. A positive aspect stated by Michelle, “Sharing the information broadens your experience a little bit because even though you didn’t go to something, you did get a little bit of understanding of the quality of the presenter and that kind of stuff that you could look for.” Rebecca mentioned the positive result from a colleague who informally shared their assessment. She said, “Someone who attended a virtual conference reported back what they learned and gave our group some next-step tasks to consider based on what they learned.” Denise’s assessment was to informally shake things up, “Sort of like the little rabble-rouser, trying to think, go around, and talk to other staff members in sharing with them and help how this information can help our organization.”

However, Alana was cautious who she shared her assessment by saying, “I might have told colleagues, but I didn’t take it back to management because I knew I would be the one who would have to set up how we are going to implement this or make the change.” In keeping with the focus group as a conversation, Vanessa echoed Alana thoughts by saying, “That would make me uncomfortable if I was going to be the workhorse just for sharing information.”

### ***New Group and Training Culture***

Sharing information with new work employees could be considered a type of evaluation especially beneficial to implementing a strategy for fulfilling individual and group goals. From the journal prompts, I observed five participants specifically responded on implementing evaluations over the next several years to assess fulfillment of goals as related to new staff or company culture. Vanessa stated, “the evaluations definitely allowed us to take the training to help shape the training for new staff to make it better for them.” Sandra wrote, “It could be used to help improve culture by attending to the needs of who they are serving. The evaluation could be used to help improve their goals and better the company.” James reflected, “The Kirkpatrick

Evaluation framework model can assist with assessing the training culture in the future which can impact the learning strategies implemented.” Pam stated, “Consistently allowing individuals to provide their thoughts and perspectives will help ensure that all voices, not just the loud ones, are being heard.” Rebecca mentioned, “As new employees enter the work force, this is also important because those who are new to having employment may not be up to speed like more established employees. With new staff, there may be new ideas.” Karen reflected,

I believe this type of evaluation provides an accountability framework that supports sociocultural change by negating individuals and organization’s ability to engage in performative of superficial change measures. This evaluation in conjunction with professional development and other assessments methods turns a learning strategy into a tangible goal with evidence-based results.

From the focus group transcript, Barbara suggested the Framework, “...brings forth diversity to the different strategies that can be used.” Denise stated, “I think it’s not just training. I think it’s a combination of things. And the Kirkpatrick Evaluation Framework can be a model because we are looking at what are some of the challenges and we are embarking on a new strategic plan.”

### **Outlier Data and Findings**

There were two unexpected findings that did not align with specific research questions or themes were also presented. One participant reflected on an evaluation required to complete training, and another participant reflected on a survey of training needs before prescribing training. These outliers were different from the other participant lived experiences.

### ***Evaluation Required to Complete Training***

In response to focus group question about when the participants were asked to reflect on

their lived experience for filling out the formal evaluation because it was the best thing to do, not as a requirement, one participant reflected on one time when the learners had to fill out an evaluation to complete the training course. Karen stated, “I felt like I was more invested in the program knowing that for me to get full completion of this program, I am going to have to evaluate and not like a quiz, but I am going to have to complete this evaluation.” This type of reflection is an outlier because in most organizations, filling out a formal evaluation is optional after completing training, even if the learner might earn continuing educational credits. Only one participant knew the evaluation was required in order to complete the program.

### ***Survey of Training Needs***

Most organizations prescribe professional development programs, which management has deemed beneficial for the members or employees with little or no input from the learners. However, if the learner is surveyed in advance of determining the need, a series of formal evaluations could change the sociocultural atmosphere of the organization to a learner-centered or reflective teaching environment by focusing on the following four interdependent areas: the learner, the content, the psychological progress, and the community (Schunk, 2020; Tomlinson, 2021). In response to the focus group question, which asked the participants to reflecting on previous professional development programs, what has been your experience between your manager or the organizational leadership when completing an informal or formal evaluation, one participant reflected on the one time her organization surveyed the entire staff on their training needs before prescribing professional development programs. Vanessa revealed, “Then they used those results in the following years for some of the training courses that they designed. That is where I have seen the impact made on the front end.”

### **Research Question Responses**



All the participants reflected on valuable life experiences and evaluations as feedback for management, peers, and themselves in comparison to the adult learning theory and the Kirkpatrick Evaluation Framework. This section offers a concise response to each of the research questions, which embody the analysis of the information conveyed. The participant descriptions with direct quotes from the journal prompts and focus group transcript helped to form the narrative themes presented in a table, outlier data, and research question responses.

### **Central Research Question**

What are learners' lived experiences for filling out a professional development program's formal evaluation after learning about the Kirkpatrick Evaluation Framework? If the organization does not get the desired results after assessing the fulfillment, then they may have to recreate the strategy. The key attributes of CADDIE methodology, or cyclical ADDIE within instructional technology to analyze, develop, design, implement, and evaluate, allow a dynamic level of work methodology, or to revisit an instructional attribute, if needed (Giacomo & Breman, 2020).

From the journal prompt, Rebecca stated, "The evaluations can build on the iterative approach that makes sure participants are retaining and applying their knowledge, and the folks assessing the responses use the feedback to change to meet the group at their level." She had a challenge uploading the completed journal prompt as a PDF and used a screenshot as an alternate resource to upload the evaluation. She reflected the approximate 1-2 hours to complete the online self-paced professional development program was too long. This timeframe was an approximate number of hours as I didn't know how fast a participant could read and digest the information. Understanding time was a factor, I converted one video into a cliff notes option.

**Sub-Question One**

What happened with learners' lived experiences for determining the need or creating a strategy from an evaluation after completing a professional development program? Overall, the participants and I learned that a series of evaluations could be a crucial part of the training for improving individual and organizational needs. The organizational leadership or the instructional designer should empathize and encourage learners' cognitive growth by determining the need for value-added of the evaluation for not only themselves, but for future trainees, which might encourage the learner to self-regulate completion (Knowles et al., 2020). From the focus group discussion, Vanessa reflected,

That's what I am looking at for the organization that I am working with, which is one of the affiliates, is that we see reaction; we know what the challenges are, and now we are in that learning curve and how we are going to start to address those things, reevaluating our goals as part of that learning curve.

I observed overall from Vanessa's journal prompt and focus group reflections an understanding of the importance for a formal evaluation after training, which would benefit the organization, management, learners, and trainers. She reflected with a formal evaluation, the organization should create a strategy for organizational goals and learner's outcomes. Management and the trainers would create training to complement the organizational strategy and learner's goals.

**Sub-Question Two**

What happened with learners' lived experiences for implementing a strategy or assessing the fulfillment from an evaluation after completing a professional developmental program? Leadership involvement is necessary for time, resources, and ensuring all employees implement

the strategy and assess the fulfillment of the organization's goal. However, the Kirkpatrick Evaluation Framework (KEF) could be an intervention to training, if Level 3 and Level 4 provide the manager's assessment of the learner's application of the training, and data analysis to show the benefits of the training for the organization's development (Campbell et al., 2019). From the focus group discussion, Vanessa reflected,

I feel the improvement in learning strategies that the organization will see is that if you adopt this Framework, there is a way for management to kind of quantify the impact of the training. With this Framework, you can kind of gauge if the training is meeting the learning needs of your learners. The organization is implementing and evaluating the learning outcomes from determining and creating the training strategy.

I observed from Denise's journal prompt and focus group discussion an overall willingness to trust the Kirkpatrick Evaluation Framework would make a sociocultural difference to implement a strategy or assess the fulfillment of the learners or organizational goals; however, she was reluctant to accept as true any evaluation benefits from management not implementing changes from previous formal evaluations. As a former trainer, she found the formal evaluation to be nothing more than an attendance check mark. She concurred with the concept of the Kirkpatrick Evaluation Framework's additional evaluations to assess the fulfillment of learners' and organizational goals only if the organization explained the reasoning before implementing the Framework. To make sure she had job satisfaction despite management involvement, Denise was persistent in implementing a strategy by sharing training information with her colleagues.

### **Summary**

Overall, from the ten journal prompts, focus group transcript of seven participants,

including myself, and my observations, the data analysis found formal evaluations provided by management would determine the need and create the strategy for individual or organizational goals. The data analysis yielded the following themes: (CRQ) Kirkpatrick Framework Addresses Strategy with the subthemes of Different Levels Need Different Questions and Everyone Benefits From Feedback; (SQ1) Feedback Could Assist with Change, with subthemes of Formal Evaluations From Management and Feedback From Conference Activities, (SQ2) Implementing Strategy Needs Time, with subthemes of Sharing Information with Staff and New Group and Training Culture. The informal evaluations by the learners, when related to implementing the strategy and assessing the fulfillment of goal achievement, were dependent on if the organization had formal evaluations as a prerequisite for funding or required from management, or if management analyzed the results. The participants revealed mixed feelings with the lived experiences on implementing the strategy from informal evaluations because either there was no change in the staff's behavior or the learners were tasked to implement the changes, on top of their already busy schedules. The participants experienced more positive results from informal evaluations, and the learners were comfortable creating the strategy by encouraging the staff to ask questions and implement the strategy by communicating their learned and lived experiences.

## **CHAPTER FIVE: CONCLUSION**

### **Overview**

The purpose of this transcendental phenomenology study was to discover learners' lived experiences for filling out a formal evaluation to complete a professional development program about the Kirkpatrick Evaluation Framework for African American librarians and educators who are members of a Black Caucus affiliate group. The problem is in many organizations the Kirkpatrick Evaluation Framework's four levels are not formally adopted for professional training courses where the organizational leadership provides the content (Cariñanos-Ayala et al., 2022; Olsson et al., 2022; Rey-Becerra et al., 2021). In this chapter, I used my interpretations and ideas to refine the findings of this study and interpret them for the reader. Chapter Five consists of five subsections: (a) interpretation of findings, (b) implications for policy and practice, (c) theoretical and methodological implications, (d) limitations and delimitations, and (e) recommendations for future research.

### **Discussion**

After conducting data analysis, the findings revealed that all ten participants determined the need for a required series of formal or informal evaluations of training after completing the online self-paced professional development program about the Kirkpatrick Evaluation Framework as related to the adult learning theory. Organizations would find value in evaluations after training to determine the need for creating the learning strategy, implementing the strategy, and assessing fulfillment of the individual and organizational goals. In this chapter, I outline my interpretations of the study by summarizing each thematic finding. In addition, this chapter expands on implications for policy and practice, theoretical and methodological implications, limitations, delimitations, and lastly, recommendations for future research.

## **Summary of Thematic Findings**

There were three thematic findings identified from this study. I interpreted the thematic findings to include teamwork makes the dream work, human performance improvement, and formal evaluation vs. informal evaluation. I developed the thematic findings when analyzing the data collection from the value of a series of evaluations after completing a professional development program about the Kirkpatrick Evaluation Framework. Additionally, I highlighted each of the thematic findings with the need for a collaborative effort between the learner, manager, and training coordinator to identify inequities in learning.

### ***Teamwork Makes the Dream Work***

First, from this study I added to the existing body of sources about collective learners' motivation. The evidence shows a sociocultural motivation of collaborative groups and the motivation needed for employees to consider the evaluation as continuing professional development (Vázquez-Calatavud et al., 2021). From the study's findings, I added to the existing literature about identifying inequities from filling out an evaluation after taking a training course about the Kirkpatrick Evaluation Framework. The benefit of collecting sociocultural motivation from learners after taking a professional development program about a series of formal evaluations can identify inequities in learning for African American (Black Caucus of the Maryland Library Association, n.d.; Frechette, 2020). I observed all participants agreed the Kirkpatrick Evaluation Framework (KEF) would be beneficial to training courses for the individual, management, and organizational goals. The study's journal prompts provided qualitative lived experiences and created a beginning strategy for resources to achieve the learning goal. The study's focus group discussion became a conversation and a bridge between the learner and me as the training coordinator, with descriptive qualitative measurement for

behavioral observations. I observed the participants wanted to share their training knowledge with their peers and management, as they shared many lived experiences in the focus group reflections.

I also observed the participants had mixed reflections with management discussions. One participant reflected when management learned the staff was using Steven Covey's Time Management Strategies, after a training course, the trainer was asked to return on every year afterward. Conversely, several participants reflected on a lack of follow-up with management to determine a change in behavior or an assessment towards the organizational goals. This lack of involvement created a feeling of being cynical towards management and the organization. To make the dream work, or reaching the individual and organizational goals, there needs to be more buy-in with managers having more in-depth discussions, outside of the performance review, with the learners about their developmental needs as compared to the organizational goals (Kirkpatrick Partners, 2024g). The lack of sharing lived experiences when completing a formal evaluation can affect the organization's development; time and resources could be a wasted invested into the current employee and future leaders as strategic human capital who need the skills required for the advancement of new embedded technologies (Liu and Zainuddin, 2021).

### ***Human Performance Improvement***

Second, from this study I added to the previous literature on using the proposed flipped classroom method to get a learner's feedback by first using the professional development program as asynchronous, also known as self-paced, training, and then have a discussion of the lived experiences on the Kirkpatrick Evaluation Framework's four levels to improve overall learning. The Flipped Classroom Model (FCM) method became especially important as

instructors had to find ways to deliver their content without directly being in the same physical space as the learners by using synchronous online collaboration tools, such as video conferencing technology. (Fischer & Yang, 2022). From the literature review of the theme educational technology and design as related to technology tools, instructional design, and flipped learning, the findings discovered a professional development program complemented the training content. Learners' reaction, learning, behavior, and overall evaluation results can benefit from human performance improvement, which had the potential to identify inequities in learning for African American's sociocultural environment (Black Caucus of the Maryland Library Association, n.d.; Frechette, 2020).

From this study, I grounded the Kirkpatrick Evaluation Framework and the online self-paced professional development program with the adult learning theory functioned as both a human performance and instructional design intervention to close the gap in the literature from previous research. Grounding a qualitative study with theory builds the associated theories with methodology, data collection, analysis, categories, and patterns (Corbin & Strass, 1990). The professional development program as a technology tool determined the need to inform about the Kirkpatrick Evaluation Framework. The study participants became both the practitioner and the researcher of human performance technology (HPT) by completing the journal prompt with the sociocultural motivation of sharing their knowledge by completing the focus group discussion. The researcher observed all participants reflected on the benefits of the Kirkpatrick Evaluation Framework (KEF) after completing the training course. The act of blending HPT with instructional design represents an integral sociocultural process for organizational success, to help address performance gaps with themselves, management, and the training instructional designer (Chirkov, 2019; Osam & Nold, 2020).



As a macro-instructional strategy, the professional development program was used as an option to adapt to the study's sociocultural learning environment. An instructional designer can use educational technology training as an option to adapt to the organization's sociocultural learning environment, created with a backward design where the instructor defined learners' organizational gap and developed for a short instruction (Hostetler, K., & Luo, T., 2022). Recognizing the need to analyze the results of training content determined how teams and technology can work together with the approach of closing the gap between what the learners know, how they can learn from each other, and where improvements can be made, if necessary (American Evaluation Association, 2020). The Flipped Classroom Model complemented using the professional development program by allowing the adult learner to build on their experiences with individual scaffolding before collaborating with their peers about lived experiences to know the benefits of the formal evaluation (Knowles et al., 2020). The flipped learning of taking the professional development program before journaling or through discussions increased learners' basic understanding of all four levels of the KEF after completing the training course and filled the gap for research on the effect with lived experiences about a series of formal evaluation's methodology.

With this study's findings, I also confirmed a need to have multiple versions of the professional development program, which aligns with the literature review's theme of educational technology and design as related to technology tools. The advancement of technology has changed the way educators and learners leverage dual visual and audio principles in training programs to stimulate working memory and activate prior knowledge to enhance long-term memory, and thereby create the beginning of a sociocultural learning environment (Antonenko et al., 2020; Frechette, 2020; Oh & Hong; 2020). What emerged was the need to

provide the Kirkpatrick Evaluation Framework information as a mobile app option or a video titled “Kirkpatrick’s 4 Levels of Evaluation in One Minute” as CliffsNotes option. The Universal Design for Learning assists with designing educational technology with intentional planning for learner diversity to facilitate performance with three principles: engagement, action and expression, and representation (Antonenko et al., 2020; Hayward et al., 2022). These three tenets encourage redesigning the educational technology for a learner-centered or reflective teaching environment, (Garcia & Lee, 2020; Schunk, 2020). From this study, I filled a gap to keep the learner motivated by redesigning technology to increase intrinsic motivation for completing the professional development program with a shorter version explaining the primary principles of the Kirkpatrick Evaluation Framework with a YouTube® video, and a portable version of the knowledge with a mobile app. Development of a new tool, could create a sound foundation for an organization’s results to validate a professional development program for performance and organizational impact, especially in the field of social science (Alsalamah & Callinan, 2022; Nguyen et al., 2019).

### ***Formal Evaluation Vs Informal Evaluation***

Third, with this study I discovered the need for a shared vision in evaluating training. A shared vision for a change in evaluating training can increase participation and show the importance of the learner, manager, and training coordinator working together for success which may increase participation and demonstrate the importance of the learner, manager, and training coordinator working together for success (Doten-Snitker et al., 2021). There was a divergence from this study’s literature and a learner’s lived experience when applying the Kirkpatrick Evaluation Framework. From the literature review theme of training effectiveness, a descriptive quantitative study of managerial training effectiveness with 145 full-time middle-level managers

nominated in two series of evaluations, 9 of the managers, or 6% of that elected, self-elected not to participate in the evaluations (Sahni, 2020). In this study, I analyzed six of ten participants were either managers or on an association's Executive Board, and 50% of these participants self-elected not to participate in the focus group discussion. The number of managers who decided not to participate in this study's focus group diverged from the literature review of managers who did not participate in the formal Level 1 and Level 2 series of evaluations. If the managers from this study were not fully participating in the study's requirements as outlined in the recruitment letter, what were their expectations for their employee's expectations on filling out a series of formal evaluations (Jones, 2020; Raković et al., 2022)?

With this study's literature, I also reviewed the theme of knowledge sharing as related with collaboration. From this study, the participant's lived experiences in how they shared training content with their peers was a form of activism, which facilitated a greater understanding of the challenge for communicating knowledge to value their educational journey as they found balance in common problems and solutions (Muhammad et al., 2020). One method currently used to identify inequities in professional development programs (PDP) for members is through informal evaluations or assessments presented during the year, such as communication channels: smiles or frowns on learners' faces, emotional icons, chat responses, discussions, or direct emails to the facilitator before, during, and after training (Tobias de Sousa Lima et al., 2022). With the informal methods, the participants mentioned several times that they would share training information with their peers, if they determined a need to benefit individual or organizational goals. The participants showed a dedication to the organization goals, by informally sharing the training knowledge with a lack of management involvement or assessing the fulfillment of the individual or organizational goals. Yet,

determining the right data collection requires investments of time and additional resources (Minbaeva, 2018).

Unfortunately, from the study's literature I did not research how informal evaluations from training might require additional time and resources. The participants concurred they did not want to share their knowledge from training if they might become a workhorse or overburdened from their daily performance. For example, how often have educators had informal evaluations amongst their peers about historically using their salaries to buy supplies for their students, and what were the outcomes? How often have librarians had to informally evaluate their own knowledge about computer software to keep abreast with current technology and provide effective patron assistance, especially if there is no formal training? Having learner support may help organizations develop changes to the training course content (Johnson et al., 2020). If the learner is surveyed in advance of determining the need, a series of formal evaluations could change the sociocultural atmosphere of the organization to a learner-centered or reflective teaching environment by focusing on the following four interdependent areas: the learner, the content, the psychological progress, and the community (Schunk, 2020; Tomlinson, 2021). In this study, I found the participants wanted more involvement with their training goals and more management involvement with the formal evaluations, or they might become cynical about their work and the organization. If the learner is not motivated to understand the informal or formal evaluation as a necessary component of training and can become disengaged to complete a formal or informal evaluation (Lane et al., 2020). With this study, I closed the gap of discovering learners' lived experiences on the importance of the training evaluation as part of the training process (Khaskhelly & Khoso, 2018).

## **Implications for Policy and Practice**

From this study, I am suggesting policy and practice implications for addressing systemic inequities among African American librarians, African American educators, or members of an association with a Black Caucus to implement a series of formal evaluation. With this section, I provide recommendations for policymakers, leaders, management, and library and educational learners on policies and practices to address the inadequate outlets for evaluating development and research for professional development programs, with issues relating to the inequities in learning. Additionally, I emphasize how learners are informally evaluating training by sharing the knowledge with their peers when attending conferences and training programs.

### ***Implications for Policy***

Based on my findings, this study had implications for policy. From my research, I suggested that organizations should consider the Kirkpatrick Evaluation Framework (KEF) as an integral extension of training, at a minimum with the Level 3 and Level 4 evaluations. If the organization encouraged the manager to implement consistent communications with the learner and then assessed a behavior change of learners' application of the training, the data analysis could show the benefits of the training for the organization's development (Campbell et al., 2019). The Level 3 evaluation encourages conversations and transfer of knowledge between the learner and management; however, beginning with Level 1 of the KEF and slowly implementing Level 2 and Level 3 is a good beginning to establish the Level 4 results (Kirkpatrick Partners, 2024f). Whichever path the organization decided to take, there would be an implication of policy to implement the strategy. These four levels of assessment have the potential ability to improve the training and change the learning environment to a community-centered or equity-centered workspace (Abadi et al., 2020; Garcia & Lee, 2020; Tomlinson, 2021).

### *Implications for Practice*

Based on the findings, the study has implications for practice. Without determining the knowledge gained from the professional development program and only being concerned with the number of hours while the application is open, the cognitive load is undetermined. The advancement of technology has changed the way educators and learners leverage dual visual and audio principles in training programs to stimulate working memory and activate prior knowledge to enhance long-term memory, and thereby create the beginning of a sociocultural learning environment (Antonenko et al., 2020; Frechette, 2020; Oh & Hong; 2020). From this study, although the participants did not have to view each module in the online self-paced professional development program, there was a need to offer the training by mobile app and video CliffsNotes version. An implication of practice would be to offer the training in multiple formats, for example as live training, a recording of the live training, and as a transcript of the training.

When comparing the results from 54,211 participants, the Kirkpatrick Evaluation Framework's (KEP) Level 1 evaluation, also known as a smile or happy sheet, from the classroom activities is not as effective to demonstrate a growth mindset as the Level 3 evaluation for behavior of demonstrated activities outside the classroom activities (Hauser et al., 2020; Sisk et al., 2018). Although I did not use the Level 1 evaluation results, this study corroborates with the literature review. I found a growth mindset from the focus group discussion where the participants had much more to say verbally than in the written journal prompts. However, for a complete analysis, evaluations from both the KEP Level 1 or reaction and Level 3 or behavior are needed to get a full picture of learners' behaviors from the professional development program (Hauser et al., 2020). An implication of practice would be for organizations to at minimum have

group discussions after a training course to allow the learners to verbally share their lived experience and knowledge.

### **Empirical and Theoretical Implications**

From this study, I suggested empirical and theoretical implications for addressing systemic inequities among African American librarian and educator members of a Black Caucus when completing a series of formal evaluations after a professional development program. With the study's educational technology and design theme I discovered a novel empirical implication to the philosophy of education. When I compared the theoretical implications, this study confirmed a correlation with the adult learning theory from the philosophy of education theme as related to the Kirkpatrick Evaluation Framework's four levels of evaluation. With this study, I also found a correlation of theoretical implications with the philosophy of education theme as related to human motivation with the social exchange theory and the cognitive load theory.

#### ***Empirical Implications***

My findings in this study are similar to the current literature on educational technology and design theme. With this study, I added a novel empirical implication to the field to discover learners' lived experiences in learning about the Kirkpatrick Evaluation Framework (KEF) from the online self-paced professional development program, before applying the KEF series of evaluations. The value of the KEF can range from establishing what management needs to do to improve learning strategy, expose learners' weaknesses which helps with growth, and offer diversity to the different strategies (Kirkpatrick Partners, 2024c). My research from this study suggested the professional development program complemented the KEF training content as a reminder of how learners' reaction, learning, behavior, and overall evaluation results are a collaborative effort. Whether a current employee or someone hired for the role, an instructional

designer could create a process that assists with intrinsic motivations, decreases the extrinsic motivations, improves learners' cognitive load on the area of study, and allows applying the resource to the organization's needs (Agrela de Andrade et al., 2022; Brown & Green, 2020; Schunk, 2020). In this study, I found when the participants learned the reasons for the additional evaluations from the professional development program, their intrinsic motivation increased to share their lived experiences, their extrinsic motivation decreased as there were no financial rewards, and each participant learned the importance of evaluations for the improvement of themselves and their organization.

### ***Theoretical Implications***

In this study, I achieved the theoretical implication of triangulation by relating the findings to three theories, which include the adult learning theory, the social exchange theory, and the cognitive load theory. The adult learning theory hypothesized both organizing and analysis of data, the social exchange theory hypothesized cohesiveness and interaction, and the cognitive load theory hypothesized working memory (Homans, 1958; Knowles et al., 2020; Sweller, 2020). First, the adult learning theory hypothesized that adults learn by using self-direction to build on their experiences and knowing why and how the learning will benefit their lives when progressing through four process phases of gaining knowledge (Knowles et al., 2020). By introducing the Kirkpatrick Evaluation Framework through the online self-paced professional, I allowed the participants to pick and choose how much they needed to learn. The adult learning theory's four phases, 1. Determining a need, 2. Creating a strategy, 3. Implementing a strategy, and 4. Assessing the fulfillment of the strategy, grounded with the KEF's four levels of evaluation, Level 1: Reaction, Level 2: Learning, Level 3: Behavior, and Level 4: Results (Kirkpatrick Partners, 2023a; Knowles et al., 2020). Second, the social exchange



theory hypothesized adult learners bring experience to their training (Homans, 1958). From the focus group discussion, I analyzed the zone of proximal development between what was known and what is learned from others and the environment. Third, the cognitive load theory reduced working memory (Sweller, 2020). In this study, I developed an online training course with three short modules and provided the content of the training by mobile app and video CliffsNotes version.

Grounding a qualitative study with theory builds the associated theories with methodology, data collection, analysis, categories, and patterns (Corbin & Strass, 1990). Dr. Donald Kirkpatrick did not ground his dissertation about evaluation human relations programs in an educational theory (Kirkpatrick, 1954; Sitzmann & Weinhardt, 2019). However, from this study, I positioned the Kirkpatrick Evaluation Framework (KEF) as a transferable and credible evaluation practice with educational theories. and grounded the adult learning theory with the Kirkpatrick Evaluation Framework (KEF). With this study, I filled the gap for discovering learner's lived experiences from learning about the outcomes of the KEF's four levels for shared decision-making, which could be valuable information for the future design of training evaluations.

Complimenting the literature review, I found this study's theoretical implications had a correlation in the philosophy of education theme as related to training effectiveness between the adult learning theory and the Kirkpatrick Evaluation Framework's (KEF) four levels of evaluation. The adult learning theory's phases for determining the need and creating the strategy connected with the journal prompts and focus group discussion for learning about how much the learners gained from the course compared to what they previously knew. All six focus group discussion participants had not heard of the KEF before the study and all participants determined

a need for the gained knowledge to create a better learning strategy. Implementing the KEF's learning strategy connected with the Level 3 of behavior and Level 4 of results (Ronan, 2021). Each of the focus group participants reflected on how they implemented previous training course content by encouraging their colleagues to ask questions, write summary reports, or complete a required summative evaluation. In some cases, these behaviors led to an assessment to determine a series of formal evaluations initiated by the organization would have the greatest value on fulfilling individual and organizational goals.

With this study, I also confirmed theoretical implications with the human motivation theme as related to collaboration and growth mindset. The social exchange theory's hypothesizes cohesiveness and interaction with a participant's response to an online course through the cognitive load theory with working memory and educational technology (Hadad et al., 2021; Sweller, 2020). From the social exchange theory, there was a positive cohesiveness with study participants from the journal prompts, as each participant found a benefit in the Kirkpatrick Evaluation Framework. This cohesiveness gave a safe space for six of the ten study participants to collaborate in the focus group discussion about their lived experiences with evaluations. The focus group also revealed a positive impact on the participant's growth mindset as a part of the cognitive load theory through the responses of 15 questions, selected based on the adult learning theory. Requesting the lived experiences in increments can minimize extraneous cognitive load (Eizaguirre et al., 2020; Skulmowski & Xu, 2022). Minimizing the participant's cognitive load allowed me to assess competency gaps from the from the journal prompt after taking the training and applying the training with the focus group discussion. The focus group did not feel like an interview, but a conversation where one participant would reflect on another participant's response, and I asked clarifying questions to make sure we all understood. As the participants

collaborated on the focus group questions, they were impacted by the similarity of their lived experiences. This impact changed the sociocultural atmosphere of the study to a learner-centered or reflective teaching environment by focusing on the following four interdependent areas: the learner, the content, the psychological progress, and the community (Schunk, 2020; Tomlinson, 2021).

### **Limitations and Delimitations**

Several limitations and delimitations of this research study were identified. With this study, I conveyed two potential limitations: fear of one-on-one interviews, fear of retribution, and. Additionally, I had three main delimitations: type of study, age, requesting members from Black Caucus affiliate groups, and completion of the professional development program. I have provided a detailed explanation of the limitations and delimitations of this study's research study in the following subsections below.

#### ***Limitations***

Limitations in research are the extrinsic criteria used that could not be controlled (Viera, 2023). I had two limitations in this study, which were the fear of one-on-one interviews and fear of retribution. The first limitation was initially having participants being observed in individual interviews. The weakness of this limitation was I did not realize the similarities of an individual interview and a one-one-one interview. The individual interview might have been perceived like a performance evaluation, which may have seemed intimidating. The second limitation was a fear of retribution. The weakness of this limitation may have been from the participants thinking I would expose their identities if they did not provide positive responses in the journal prompts. This weakness was overcome from the focus group discussion, as the participants had a safe place to agree and disagree with me and each other.

### *Delimitations*

Delimitations in research are intrinsic criteria intentionally put on the study (The AJE Team, 2022). I had five delimitations in this study, which were the type of study, age of participants, sample size, requesting members from Black Caucus affiliate groups, and completing the professional development program. The first delimitation was choosing a transcendental phenomenology because I could practice epoché, by collecting the data with fresh eyes, setting aside my own understanding and judgements as a librarian and educator, since I did not have the same work environment as the candidates (Moustakas, 1994). I worked as an embedded employee in the government and did not work directly with the public as most of the participants. The second delimitation was the participant's age because most degreed librarians and educators are over 18 years of age. The third delimitation was a sample size of smaller than ten participants to gather relevant data for analysis. The School of Education Administrative Chair of Doctoral Programs and Research would not accept no fewer than 10 participants without written approval from. The recruitment plan samplings prevent the subjectivity of the researcher and the participants (Olsen, 2018). Also, using a sample size of less than ten participants may have presented a challenge in generalizing the findings because it would not be an accurate representation of all African American librarians or educators in the United States. The fourth delimitation was to request candidates from Black Caucus affiliate groups. The delimitation weakness could have become a limitation as many Black Caucus affiliate groups have members, who are not African American, might have thought the study only wanted African American participants. The fifth delimitation was for the participants to fill out the journal prompt to complete the professional development program. The weakness of this delimitation was initially providing the training contents in the massive open online course

application accessible only by a desktop or laptop. To overcome this weakness, I integrated the mobile app version to encourage more participants to complete the training.

### **Recommendations for Future Research**

In consideration of the study's findings, limitations, and delimitations placed on the study, there are multiple recommendations and directions for future research. Many research studies have been conducted on the value of the Kirkpatrick Evaluation Framework's (KEF) four levels of evaluation. The first recommendation for future research would be to conduct further empirical studies for public service employees on the time and resources required to complete and analyze a series of evaluations. The populations studied could a quantitative or qualitative study of learners who have worked in public service occupations from 1-10 years as opposed to 10 or more years, analyzing the KEF Level 1 and Level 4 evaluations. A second recommendation for a future study would be to discover the qualitative implementation strategy and assessment to fulfill individual and organizational goals from public service employees sharing informal evaluations. A third recommendation would be an empirical qualitative study for public servant on the effectiveness of combining the KEF's Level 1 with Level 2, then analyzing the Level 3 and Level 4 evaluations based on the combination of the first two levels of evaluations.

### **Conclusion**

With this study, I aimed to discover learners' lived experiences for filling out a formal evaluation to complete a professional development program about the Kirkpatrick Evaluation Framework (KEF). A transcendental phenomenological research design was used to learn of the lived experiences of African American librarians and educators who are members of a Black Caucus affiliate group. The adult learning theory was the theoretical framework, which

hypothesized that adults learn by using self-direction to build on their experiences knowing why training courses will benefit their lives (Knowles et al., 2020). Data was collected, to include journal responses, a focus group discussion, and the researcher's observations from 10 African American librarians or educators, and analyzed using epoché, imaginative variation, and transcendental-phenomenological reduction to relate the lived experiences of how learner's feel compared to what the experience means (Husserl, 1970; Moustakas, 1994). The purposeful sampling came from those candidates who filled out the journal prompt, to complete the training program. After analyzing the data collection, many significant implications for future policies, practices, and empirical works were revealed. The key findings added to the existing body of sources to include the sociocultural motivation of collaborative groups, the flipped classroom method proved effective in getting learners' feedback by first using the professional development program as asynchronous training with a discussion afterwards, and a shared vision for a change in evaluating training showed the importance of the learner, manager, and training coordinator working together for success. The theoretical framework was validated by revealing a need for a training program to determine the need for formal evaluations before creating a strategy for a series of evaluations after taking a training course. The study also found a need for organizations and management to have more conversations and collaborations to implement the training strategy and assess fulfillment of training outcomes.

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## Appendix A

### Setting Approval Letters

Judine Slaughter  
Student at Liberty University  
Email: [Redacted]  
Phone: [Redacted]

March 12, 2023

President  
Black Caucus

Dear [Redacted]:

As a graduate student in the School of Education at Liberty University and a current member of the [Redacted], I am conducting research as part of the requirements for a doctoral degree. The title of my research project is “Learner-Lived Experiences of Applying the Kirkpatrick Evaluation Framework after a Professional Online Development Program: A Single Instrument Bounded Case Study.” The purpose of the single instrument bounded case study is to discover what are the learner’s lived experiences from the Kirkpatrick Evaluation Framework’s four evaluation levels after completing an associated online professional performance training for participants at the [Redacted].

I am writing to request your permission to conduct my research in the online setting with the [Redacted].

Participants would be required to complete a Screening Survey and will be presented with informed consent information prior to participating. Taking part in this study is completely voluntary, and participants are welcome to discontinue participation at any time. The length of the research will be approximately one year, and the participants would be asked to:

- Review and sign a consent form to participate in the study. Return to me within 30 days after receipt.
- Complete an asynchronous learning professional online development program (approximately two hours).
- Fill in a [Journal Prompt](#) after taking the professional online development program. Return the [Journal Prompt](#) to me by email within 30 days after completion.
- Participate in an individual one-hour audio-recorded interview, with voice-changing software.
- Review their individual interview transcripts for accuracy. Return the transcript to me by email within 30 days of receipt.

Thank you for considering my request. If you choose to grant permission, please provide the document below on official letterhead, or respond by email to [Redacted]. A permission letter document is attached for your convenience.

Sincerely,

Judine Slaughter  
Student, Liberty University

Date March 22, 2023

Judine Slaughter  
Student  
Liberty University  
3777 Candler's Mountain Road  
Lynchburg, VA 24502

Dear Judine Slaughter:

After a careful review of your research proposal entitled "Learner-Lived Experiences of Applying the Kirkpatrick Evaluation Framework after a Professional Online Development Performance Program: A Single Instrument Bounded Case Study", I have decided to grant you permission to conduct your study at with the members of the [Redacted].

Check the following boxes, as applicable:

- We will provide our membership list to Judine Slaughter, and Judine Slaughter may use the list to contact our members to invite them to participate in her research study.
- We grant permission for Judine Slaughter to contact the [Redacted] to invite them to participate in her research study.
- We will not provide potential participant information to Judine Slaughter, but we agree to send her study information to the [Redacted] on her behalf.
- We are requesting a copy of the results upon study completion and/or publication.

Sincerely,

President  
[Redacted]

**Appendix B**

**Committee's Approved Defense Decision**



**Decision Form  
Liberty University  
School Of Education**

**Instructions:** Complete this form and submit it to [SOEDocReview@liberty.edu](mailto:SOEDocReview@liberty.edu) within 24-hours of the defense.

<b>Student Information</b>	
Candidate Name	Judine Eleanor Slaughter
LU ID#	L29857885
Candidate email address	[Redacted]
Project Title	Learner's lived experiences of applying the Kirkpatrick Evaluation Framework after an online self-paced professional development program: A transcendental phenomenology
Defense Date	
<b>Committee Information</b>	
Chair/Mentor	Dr. Matt Ozolnieks
Committee member (Dissertation Only)	Dr. Vonda Beavers
Committee member (Dissertation Only)	
<b>Defense Type (Select only one of the options below):</b>	
<b>Applied Research</b>	
<input type="checkbox"/>	Applied Research <i>Proposal</i> Defense (The proposal defense presentation consists of Chapters 1, 2, and 3)
<input type="checkbox"/>	Applied Research <i>Final</i> Defense (The final defense presentation consists of Chapters 1-5)
<b>Dissertation</b>	
<input type="checkbox"/>	<b>Dissertation <i>Proposal</i> Defense</b> (The proposal defense presentation consists of Chapters 1, 2, and 3)
<input type="checkbox"/>	Dissertation <i>Final</i> Defense (The final defense presentation consists of Chapters 1-5)
<b>Approval Decision (Select only one of the options below):</b>	
<input type="checkbox"/>	<b>PASS: Approved with minor or no further revisions</b>
<input type="checkbox"/>	PASS: Provisionally approved with major revisions
<input type="checkbox"/>	NO PASS: Not approved with recommendations to revise or rewrite

<b>Turnitin Check (Final Defense only)</b>	
Turnitin Plagiarism Score: _____ % (If plagiarism score is above 20%, select one of the options below):	
<input type="checkbox"/>	High score due to previous submissions of candidate's manuscript

	High score due to plagiarism issues (contact <a href="mailto:SOEDocReview@liberty.edu">SOEDocReview@liberty.edu</a> for concerns).
--	--

<b>Additional Comments (Optional):</b>
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Please explain:
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**Appendix C**

**Liberty University's Institutional Review Board (IRB) Approval**

**[External] IRB-FY23-24-1 - Initial: Initial - Expedited**

do-not-reply@cayuse.com &lt;do-not-reply@cayuse.com&gt;

Mon 8/28/2023 12:02 PM

To:[Redacted];[Redacted]

---

[ EXTERNAL EMAIL: Do not click any links or open attachments unless you know the sender and trust the content. ]

---

August 28, 2023

Judine Slaughter  
Matthew Ozolnieks

Re: IRB Approval - IRB-FY23-24-1 LEARNER'S LIVED EXPERIENCES OF APPLYING THE KIRKPATRICK EVALUATION FRAMEWORK AFTER AN ONLINE SELF-PACED PROFESSIONAL DEVELOPMENT PROGRAM: A TRANSCENDENTAL PHENOMENOLOGY STUDY

Dear Judine Slaughter, Matthew Ozolnieks,

We are pleased to inform you that your study has been approved by the Liberty University Institutional Review Board (IRB). This approval is extended to you for one year from the following date: August 28, 2023. If you need to make changes to the methodology as it pertains to human subjects, you must submit a modification to the IRB. Modifications can be completed through your Cayuse IRB account.

Your study falls under the expedited review category (45 CFR 46.110), which is applicable to specific, minimal risk studies and minor changes to approved studies for the following reason(s):

7. Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies. (NOTE: Some research in this category may be exempt from the HHS regulations for the protection of human subjects. [45 CFR 46.101\(b\)\(2\)](#) and (b)(3). This listing refers only to research that is not exempt.)

**For a PDF of your approval letter, click on your study number in the My Studies card on your Cayuse dashboard. Next, click the Submissions bar beside the Study Details bar on the Study Details page. Finally, click Initial under Submission Type and choose the Letters tab toward the bottom of the Submission Details page. Your stamped consent form(s) and final versions of your study documents can be found on the same page under the Attachments tab.** Your stamped consent form(s) should be copied and used to gain the consent of your research participants. If you plan to provide your consent information electronically, the contents of the attached consent document(s) should be made available without alteration.

Thank you for your cooperation with the IRB, and we wish you well with your research project.

Sincerely,

**G. Michele Baker, PhD, CIP**  
*Administrative Chair*  
**Research Ethics Office**

**Appendix D**

**Recruitment Letter**

Dear Association Members:

As a student in the School of Education at Liberty University, I am conducting research as part of the requirements for a doctoral degree. The purpose of my research was to discover learners' lived experiences for filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework for participants who are a member in either African American librarians, educators, or members of an association with a Black Caucus. I am writing to invite eligible participants to join my study.

Participants must be 18 years of age or older, a currently employed or retired either African American librarians, educators, or members of an association with a Black Caucus [not managers in their professional career, managers in their professional career, or members who serve on the organization's executive board], and have agreed to filled out the formal evaluations from the online self-paced professional development program about the Kirkpatrick Evaluation Framework.

If willing, you are asked to:

- Complete the online 11-question screening survey. (Approximately 15-20 minutes).
- Allow the researcher to use the responses to the online screening survey in the data analysis of this study.

Eligible participants from the screening survey will be asked to:

- Fill out two evaluations, a Kirkpatrick Evaluation Framework (KEF) Level 1 scaled 8-statement and a KEF Level 24-question journal prompt, to complete a self-paced online 4-module professional development program about the KEF. (Approximately forty-five minutes to one hour).

- Allow the researcher to use the responses to Kirkpatrick Evaluation Framework's (KEF) Level 2 evaluation for data analysis of this study. The responses from KEF's Level 1 evaluation will not be collected data analysis.
- Be observed by Judine Slaughter in a audio-recorded panel discussion with voice-changing software. (Approximately forty-five minutes to one hour audio-recording).
- Review the panel discussion transcript for accuracy. (Approximately 20-30 minutes). Return the transcript to me by email within 30 days of receipt.

It should take approximately four hours over a month to complete the procedures listed. Names and other identifying information will be requested as part of this study, but participant identities will not be disclosed.

To participate, please [click here](#) to complete the screening survey. If you meet my participant criteria, I will send you a separate email with a link to the consent form to participate in the study. The consent document also contains additional information about my research. If you choose to participate, you will need to sign the consent document and return it to me via email prior to participating in any procedures. Participant responses will be kept confidential by replacing names and other identifying information with pseudonyms.

If you have any questions or concerns, please contact me by phone at [Redacted] or by email at [Redacted].

Sincerely,

Judine Slaughter  
Student, Liberty University  
[Redacted]



**Appendix E**

**Follow Up Recruitment Letter**

Dear Association Member:

As a student in the School of Education at Liberty University, I am conducting research as part of the requirements for a doctoral degree. Two weeks ago, an email was sent to you inviting you to participate in a research study. This follow-up email is being sent to remind you to respond if you would like to participate and have not already done so. The deadline for participation is November 18, 2023.

Participants must be 18 years of age or older, a current or retired African American librarians, African American educators, or members of an association with a Black Caucus [not a manager in their professional career, a manager in their professional career, or on the organization's executive board], and have filled out the evaluations from the self-paced online professional development program. Taking part in this research project is voluntary.

If willing, you are asked to:

- Complete the online 11-question screening survey. (Approximately 15-20 minutes).
- Allow the researcher to use the responses to the online screening survey in the data analysis of this study.

Eligible participants from the screening survey will be asked to:

- Fill out two evaluations, a Kirkpatrick Evaluation Framework (KEF) Level 1 scaled 8-statement and a KEF Level 24-question journal prompt, to complete a self-paced online 4-module professional development program about the KEF. (Approximately one-two hours).
- Allow the researcher to use the responses to Kirkpatrick Evaluation Framework's (KEF) Level 2 evaluation for data analysis of this study. The responses from KEF's Level 1 evaluation will not be collected for data analysis.
- Be observed by Judine Slaughter in a audio-recorded panel discussion with voice-changing software. (Approximately forty-five minutes to one-hour audio-recording).
- Review the panel discussion transcript for accuracy. (Approximately 20-30 minutes). Return the transcript to me by email within 30 days of receipt.

It should take approximately four hours over a month to complete the procedures listed. Names and other identifying information will be requested as part of this study, but participant identities will not be disclosed.

To participate, please [click here](#) to complete the screening survey. If you meet my participant criteria, I will send you a separate email with a link to the consent form to participate in the study. The consent document also contains additional information about my research. If you choose to participate, you will need to sign the consent document and return it to me via email prior to participating in any procedures. Participant responses will be kept confidential by replacing names and other identifying information with pseudonyms.

If you have any questions or concerns, please contact me by phone at [Redacted] or by email at [Redacted].

Sincerely,

Judine Slaughter  
Student, Liberty University

**Appendix F**

**Screening Survey**

Introduction: As a student in the School of Education at Liberty University, Judine Slaughter is conducting research as part of the requirements for a doctoral degree. The purpose of this research is to explore learners' lived experiences for filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework for participants in an association with Black Caucus Association.

Q1. Are you a member of an association that has Black Caucus? Select One.

- a. Yes
- b. No

Q2. Do you identify as African American? Select One.

- a. Yes
- b. No

Q3. In your current position, what type of learner do you identify when participating in professional development programs? Select One.

- a. Employed or retired and not a manager in my professional career
- b. Employed or retired and a manager in my professional career
- c. Employed or retired and, on the organization's, Executive Board

Q4. Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

- a. Yes
- b. No

Q5. Are you 18 years or older? Select One.

- a. Yes

b. No

Q6. Do you have a high school degree or GED? Select One.

a. Yes

b. No

Q7. Do you identify your gender as female or male? Select One.

a. Female

b. Male

c. No response

Q8. Are you currently pregnant?

a. Yes

b. No

Q9. Are you a member of the Armed Forces? Select One.

a. Yes

b. No

Q10. Do you have a cognitive or physical disability?

a. Yes

b. No

Q11. If you are selected as an eligible participant, what is your best contact email and telephone number?

	Email	Telephone Number
Your response		

## Appendix G

### Completed Surveys

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-09-21 09:50:40.497

[Submit] 2023-09-21 09:52:45

[Duration (seconds)] 124

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and not a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]

Yes

[Question 7]

Do you identify your gender as female or male? Select one.

[Answer]

Female



[Question 8]

Are you currently pregnant?

[Answer]

No

[Question 9]

Are you a member of the Armed Forces? Select One.

[Answer]

No

[Question 10]

Do you have a cognitive or physical disability?

[Answer]

No

[Question 11]

If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]

(Your response, Email) [Redacted]

(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-09-21 20:55:59.897

[Submit] 2023-09-21 21:00:49

[Duration (seconds)] 289

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and on the organization's Executive Board

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]

Yes

[Question 7]

Do you identify your gender as female or male? Select one.

[Answer]

Female

[Question 8]

Are you currently pregnant?

[Answer]

No

[Question 9]

Are you a member of the Armed Forces? Select One.

[Answer]

No

[Question 10]

Do you have a cognitive or physical disability?

[Answer]

No

[Question 11]

If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]

(Your response, Email) [Redacted]

(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-10-25 15:09:06.513

[Submit] 2023-10-25 15:09:52

[Duration (seconds)] 46

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and not a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]

Yes

[Question 7]

Do you identify your gender as female or male? Select one.

[Answer]

Female

[Question 8]

Are you currently pregnant?

[Answer]

No

[Question 9]

Are you a member of the Armed Forces? Select One.

[Answer]

No

[Question 10]

Do you have a cognitive or physical disability?

[Answer]

No

[Question 11]

If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]

(Your response, Email) [Redacted]

(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-11-01 14:47:58.03

[Submit] 2023-11-01 14:49:48

[Duration (seconds)] 110

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]  
Yes

[Question 7]  
Do you identify your gender as female or male? Select one.

[Answer]  
Female

[Question 8]  
Are you currently pregnant?

[Answer]  
No

[Question 9]  
Are you a member of the Armed Forces? Select One.

[Answer]  
No

[Question 10]  
Do you have a cognitive or physical disability?

[Answer]  
No

[Question 11]  
If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]  
(Your response, Email) [Redacted]  
(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-11-09 16:04:21.403

[Submit] 2023-11-09 16:05:12

[Duration (seconds)] 50

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and not a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.



[Answer]  
Yes

[Question 7]  
Do you identify your gender as female or male? Select one.

[Answer]  
Female

[Question 8]  
Are you currently pregnant?

[Answer]  
No

[Question 9]  
Are you a member of the Armed Forces? Select One.

[Answer]  
No

[Question 10]  
Do you have a cognitive or physical disability?

[Answer]  
No

[Question 11]  
If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]  
(Your response, Email) [Redacted]  
(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-11-13 18:36:06.847

[Submit] 2023-11-13 18:40:56

[Duration (seconds)] 289

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and not a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]

Yes

[Question 7]

Do you identify your gender as female or male? Select one.

[Answer]

Female

[Question 8]

Are you currently pregnant?

[Answer]

No

[Question 9]

Are you a member of the Armed Forces? Select One.

[Answer]

No

[Question 10]

Do you have a cognitive or physical disability?

[Answer]

No

[Question 11]

If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]

(Your response, Email) [Redacted]

(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-11-13 18:52:45.367

[Submit] 2023-11-13 18:55:20

[Duration (seconds)] 155

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

No

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]

Yes

[Question 7]

Do you identify your gender as female or male? Select one.

[Answer]

Female

[Question 8]

Are you currently pregnant?

[Answer]

No

[Question 9]

Are you a member of the Armed Forces? Select One.

[Answer]

No

[Question 10]

Do you have a cognitive or physical disability?

[Answer]

No

[Question 11]

If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]

(Your response, Email) [Redacted]

(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-11-13 21:26:53.143

[Submit] 2023-11-13 21:28:05

[Duration (seconds)] 72

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

No

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]

Yes

[Question 7]

Do you identify your gender as female or male? Select one.

[Answer]

Female

[Question 8]

Are you currently pregnant?

[Answer]

No

[Question 9]

Are you a member of the Armed Forces? Select One.

[Answer]

No

[Question 10]

Do you have a cognitive or physical disability?

[Answer]

No

[Question 11]

If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]

(Your response, Email) [Redacted]

(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-12-11 09:06:13.76

[Submit] 2023-12-11 09:07:36

[Duration (seconds)] 82

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.



[Answer]  
Yes

[Question 7]  
Do you identify your gender as female or male? Select one.

[Answer]  
Female

[Question 8]  
Are you currently pregnant?

[Answer]  
No

[Question 9]  
Are you a member of the Armed Forces? Select One.

[Answer]  
No

[Question 10]  
Do you have a cognitive or physical disability?

[Answer]  
No

[Question 11]  
If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]  
(Your response, Email) [Redacted]  
(Your response, Telephone Number) [Redacted]

## -----Survey-----

[Title]

Screening Survey

[Introduction]

Screening Survey

## -----Response Information-----

[Status] COMPLETED

[Start] 2023-12-26 13:44:03.903

[Submit] 2023-12-26 13:45:31

[Duration (seconds)] 87

## -----Questions and Answers-----

[Question 1]

Are you a member of an association that has a Black Caucus? Select one.

[Answer]

Yes

[Question 2]

Do you identify as African American? Select one.

[Answer]

Yes

[Question 3]

In your current position, what type of learner do you identify yourself when taking professional developmental programs? Select One.

[Answer]

Employed or retired and a manager in my professional career

[Question 4]

Are you willing to fill out the formal evaluations after completing the online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework? Select One.

[Answer]

Yes

[Question 5]

Are you 18 years of age or older? Select One.

[Answer]

Yes

[Question 6]

Do you have a high school degree or GED? Select One.

[Answer]  
Yes

[Question 7]  
Do you identify your gender as female or male? Select one.

[Answer]  
Male

[Question 8]  
Are you currently pregnant?

[Answer]  
No

[Question 9]  
Are you a member of the Armed Forces? Select One.

[Answer]  
No

[Question 10]  
Do you have a cognitive or physical disability?

[Answer]  
No

[Question 11]  
If you are selected as an eligible participant, what is your best contact email and telephone number?

[Answer]  
(Your response, Email) [Redacted]  
(Your response, Telephone Number) [Redacted]

## Appendix H

### Participant Instructions

Dear African American librarians, African American educators, or members of an association with a Black Caucus:

From your responses to the Screening Survey, you have been selected to participate in the study titled: Learner's Lived Experiences for Filling Out a Professional Development Program's Formal Evaluation after Learning about the Kirkpatrick Evaluation Framework. The purpose of my research is to explore learners' lived experiences for filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework for participant members who are African American librarians, African American educators, or members of an association with a Black Caucus.

The consent form contains additional information about my research. Please review and save a copy of the consent form to your computer, type your name and the date on the form, use the signature field to sign the form, save the completed form, and return it to me as an emailed attachment before the study procedures begin. [Click here](#) for consent form.

### **Procedures**

If willing, you are asked to:

- Fill out two evaluations, a Kirkpatrick Evaluation Framework (KEF) Level 1 scaled 8-statement and a KEF Level 24-question journal prompt, to complete a self-paced online 4-module professional development program about the KEF. (Approximately one-two hours). [Click here](#) for the self-paced professional development program.

- Allow the researcher to use the responses to Kirkpatrick Evaluation Framework's (KEF) Level 2 evaluation for data analysis of this study. The responses from KEF's Level 1 evaluation will not be collected for data analysis.

After filling out the formal evaluations from the PDP, you are asked to:

- Be observed in a forty-five to one-hour audio-recorded panel discussion, with voice-changing software.
- Review the panel discussion transcript for accuracy. Return the transcript to me by email within 30 days of receipt.

I will request names and other identifying information as part of this study, but the information will remain confidential.

If you have any questions or concerns, please contact me by phone at [Redacted] or by email at [Redacted].

Sincerely,

Judine Slaughter  
Student, Liberty University

## Appendix I

### Consent Form

**Title of the Project:** Learner's Lived Experiences for Filling Out a Formal Evaluation after Learning about the Kirkpatrick Evaluation Framework: A Transcendental Phenomenology Study

**Principal Investigator:** Judine Slaughter, Doctoral Candidate, School of Education, Liberty University

### **Invitation to be Part of a Research Study**

You are invited to participate in a research study. To participate you must be 18 years of age or older, a currently employed or retired African American librarian, African American educator, or members of an association with a Black Caucus [not a manager in their professional career, a manager in their professional career, or on an organization's executive board], and have agreed to fill out the formal evaluations to complete the self-paced online professional development program. Taking part in this research project is voluntary.

Please take time to read this entire form and ask questions before deciding whether to take part in this research.

### **What is the study about and why is it being done?**

The purpose of this transcendental phenomenology study would be to discover learners' lived experiences for filling out formal evaluations after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework for participant members who are African American librarians, African American educators, or members of an association with a Black Caucus.

### **What will happen if you take part in this study?**

If you agree to be in this study, I will ask you to do the following:

- Allow the researcher to use your responses to the online screening survey in the data analysis of this study.
- Fill out two evaluations, a Kirkpatrick Evaluation Framework (KEF) Level 1 scaled 8-statement and a KEF Level 24-question journal prompt, to complete a self-paced online 4-module professional development program about the KEF. (Approximately one-two hours).
- Allow the researcher to use the responses to Kirkpatrick Evaluation Framework's (KEF) Level 2 evaluation for data analysis of this study. The responses from KEF's Level 1 evaluation will not be collected for data analysis.
- Be observed in a forty-five to one hour audio-recorded panel discussion, with voice-changing software.



- Review the panel discussion transcript for accuracy. Return the transcript to me by email within 30 days of receipt. (Approximately 20-30 minutes).

### **How could you or others benefit from this study?**

Benefits to society include learning how a multisource evaluation process can determine the need and create a strategy for professional development programs. The benefit to society could include empowering learners to assess the attainment for implementing a formal evaluation after professional development programs.

### **What risks might you experience from being in this study?**

The expected risks from participating in this study are minimal, which means they are equal to the risks you would encounter in everyday life.

### **How will personal information be protected?**

The records of this study will be kept private. Published reports will not include any information that will make it possible to identify a subject. Research records will be stored securely, and only the researcher will have access to the records.

- Participant responses will be kept confidential by replacing names with codes.
- The panel discussion will be conducted in a location where others will not easily overhear the conversation.
- Data will be stored on a password-locked computer. After three years, all electronic records will be deleted, and all hardcopy records will be shredded.
- Recordings will be stored on a password-locked computer for three years after participants have reviewed and confirmed the accuracy of the transcripts and then deleted. The researcher will have access to these recordings.

### **Is study participation voluntary?**

Participation in this study is voluntary. Your decision on whether to participate will not affect your current or future relations with Liberty University or as an African American librarian, African American educator, or member of an association with a Black Caucus. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

### **What should you do if you decide to withdraw from the study?**

If you choose to withdraw from the study, please contact me at the phone number and email included in the next paragraph. Should you choose to withdraw, data collected from you will be destroyed immediately and will not be included in this study.

### **Whom do you contact if you have questions or concerns about the study?**

The researcher conducting this study is Judine Slaughter. You may ask any questions you have now. If you have questions later, **you are encouraged** to contact me at [Redacted] or [Redacted]. You may also contact the researcher's faculty sponsor, Dr. Matthew Ozolnieks, at [Redacted].

**Whom do you contact if you have questions about your rights as a research participant?**

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, **you are encouraged** to contact the IRB. Our physical address is Institutional Review Board, 1971 University Blvd., Green Hall Ste. 2845, Lynchburg, VA, 24515; our phone number is 434-592-5530, and our email address is [irb@liberty.edu](mailto:irb@liberty.edu).

*Disclaimer: The Institutional Review Board (IRB) is tasked with ensuring that human subjects research will be conducted in an ethical manner as defined and required by federal regulations. The topics covered and viewpoints expressed or alluded to by student and faculty researchers are those of the researchers and do not necessarily reflect the official policies or positions of Liberty University.*

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

**Your Consent**

*I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.*

The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

\_\_\_\_\_  
Printed Subject Name

\_\_\_\_\_  
Signature & Date

## **Appendix J**

### **Benefits of Evaluation (MOOC); Text Version**

## **Introduction**

In this course, you will learn the importance of filling out several levels of evaluation after professional development programs based on the [Kirkpatrick Evaluation Framework](#) and who benefits from your assessments.

**Video:** Empowering Students to Own the Assessment

([https://youtu.be/8WxvVgXC\\_NY](https://youtu.be/8WxvVgXC_NY))

### ***What's in it for me?***

- Align evaluations to organizational bylaws or missions
- Understand the value of learner empowerment
- Increased satisfaction in professional development programs

### ***What will you learn from this course?***

Module One: Understanding the Level 1 Evaluation: 25 - 40 minutes

Module Two: How to apply the Level 2 Evaluation: 10 - 25 minutes

Module Three: Analysis of Evaluations: 10 - 25 minutes

Module Four: Fill Out Two Evaluations: 20 - 20 minutes

- Level 1-Reaction Evaluation: 8 statements with a scale of positive or negative responses
- Level 2-Learning Evaluation: 4 open-ended questions

### ***Instructor's Expectations***

- You can begin the content wherever you think is the best for you.
- You do not have to complete the first three modules.
- You must access Module 4 to upload the Level 2-Learning Evaluations to complete the course.

### ***About the Instructor***

In 2022, Judine Slaughter became a [Kirkpatrick Certified Professional - Bronze Level](#). She has a bachelor's in Organization Management and a master's in Library and Information Science. She is pursuing her doctoral degree in Education: Instructional Design and Technology. Since 2002, Judine initiated the United Black Writers Association, Inc. as a cooperative non-profit to encourage writing and literacy for all through workshops and educational forums.

### **Optional: Discussion Question About Evaluations before the Course**

What is the purpose of an evaluation after taking professional development programs?

Choose only ONE best answer.

- A. Collaborate with others and align the learning with the organization's Bylaws or Mission?
- B. Advocate for similar or related informative programs.
- C. Advocate for others in the community.
- D. All of the above.

D is the correct answer

### **Module One: Understanding the Level 1 Evaluation**

#### ***First Evaluation - Reaction Response***

This module begins with the importance of completing an evaluation after taking professional development programs. I was the kind of person who did not like to complete evaluations because I honestly did not think they did any good. Who really reads them? The course is over, so let me go back to work. What is the importance of the program's evaluation?

**Video:** Kirkpatrick Model in 30 seconds - 34 seconds; <https://youtu.be/5vX6DrqyZfo>

From the [Kirkpatrick Evaluation Framework](#), the first evaluation shows if the learner enjoyed their experience and if they advocate the professional development program for other employees. That is why the first section of the evaluation could have true-false or multiple-choice, Likert-type questions, also known as an objective evaluation. These are general questions geared toward the immediate response to the professional development program to determine if the training met learners' expectations. The rubric score categorizes each question to determine if you found the programming met the objectives, if the instructor was credible, and if a general view of the program was worth the time or money spent.

**Video:** What are Formative and Summative Assessments – 1:44 minutes;

<https://youtu.be/TB6HtHiaLsE>

With Level 1 evaluation or a formative assessment, an organization would know whether to provide the programming again, notify the program presenter of modifications, or if the organization should find supporting programming. Because the learner has new knowledge and is probably eager to return to work, the objective evaluation has a selection of answers and does not have essay-type responses. This type of evaluation aligns with the Kirkpatrick Evaluation Framework - Level 1 or Reaction, before the summative assessment or Level 2 evaluation. This evaluation type is typically called a “smile sheet.” The smile sheet offers opportunities for the organization's leadership to analyze the good and the bad about the programming, which will benefit the current employees, managers, and leadership, directly enhance professional development, and indirectly affect equity in learning for marginalized communities. The analysis of the evaluations also helps to inspire the next generations.

***People Who Benefit From Evaluations***

The first evaluation, taken directly after a professional development program, guides the learner to success. This evaluation can help the organization's leadership identify whether the programming was worth the time or money spent towards reaching the objectives. You have a chance to think about what you have learned and how you might apply what you have learned. The evaluation focuses on four groups: the learners, the management, the leadership, and ultimately the marginalized community. The evaluation can potentially empower the learners by providing opportunities to provide professional development feedback. The evaluation assists the leadership by ensuring the programming is valuable and meets learners' required skills. The community benefits could benefit from the evaluation because these are people the members serve with excellence and integrity.

**Video:** What is a Mission? & Why is it Important? - 4:25 minutes;

<https://youtu.be/tXsxuw3EpDM>

### ***Summary of Organization with Bylaws or Missions***

Most organizations have Bylaws that seek to identify inequities in learning for African Americans. Informal evaluations of professional development programs may be encouraged, such as emotional icons, chat responses, or a direct email to the facilitator before, during, and after a professional development program. The formal evaluation could address the challenge of identifying inequities in learning for African Americans, especially with advancements in emerging technologies and new information and communication technologies.

### **Optional: Discussion Question for Module One**

Who are the four groups of people that benefit from the training evaluation?

- A. Retired or current librarians and educators
- B. Retired or current librarians and educators in management

- C. Retired or current leaders or Executive Board members
- D. Training or Workshop Presenter
- E. All of the above

E is the correct answer

Explanation: The retired or current librarians or educators, management, leadership, and training or workshop presenter benefit from the training evaluation.

**Check Out: Level 1 - Reaction Evaluation**

Level 1 or Reaction Evaluation

Directions: Select one answer for each question.

Thank you for taking the time to provide valuable feedback.

Question	Strongly Agree	Agree	N/A	Disagree	Strongly Disagree
Overall, this training was effective in meeting my learning expectations.					
Overall, this training has been effective in advancing my knowledge.					
3. The training organization supported my learning.					
The length of the training was appropriate.					
The instructor's knowledge of the					



Question	Strongly Agree	Agree	N/A	Disagree	Strongly Disagree
subject matter enhanced my learning.					
The training materials aided my comprehension of the subject matter.					
The training delivery method was appropriate.					
This training will positively impact my work.					

**Module Two: How to Apply Level 2 Evaluation**

*How could I apply professional development programming?*

Module One of this course discussed how the Level 1 evaluation could align with an organization's Bylaws or Mission. Module Two discusses Level 2 of the Kirkpatrick Evaluation Framework. You have the ability, within six months, to see how you have applied the professional development program, to uplevel your skills, and to support your organization or community.

**Video:** How do you teach evaluation? – 1:30 minutes; <https://youtu.be/JHwLFq9eKc4>

**Applying Professional Programs to the Job**

The Level 2 evaluation, also called learning, builds upon the Level 1 evaluation. Exploration at this level is more time-consuming compared to level 1. This evaluation usually

has open-ended questions or short responses; however, it can combine multiple choice/true or false and short answers.

**Video:** The secret to giving great feedback | The Way We Work, A Ted series – 5:02 minutes; <https://youtu.be/wtl5UrrgU8c>

### ***Second Evaluation - Constructive Response***

There is a value added in the second evaluation. From Module One, we learned the first evaluation is within 30 days after professional development programs. The second evaluation, which could be completed within six months after the program, gives you more time to show where you gained experience with a thought-provoking review.

Now is the time to slow down and contemplate how you have applied the knowledge achieved in professional programming. With the Level 2 evaluation, the essay-type questions could be related to the professional development program and how the program aligns with an organization's educational goals. This evaluation would give your direct management firsthand knowledge if the time or funds were put to good use. You could reflect on the association's advocacy for the community or serve with greater collaboration. You would be responsible for showing how to use the programming or what could be done differently. This can be obtained from the second evaluation through the short answer responses. These responses could be written to educate your direct manager.

### ***Evaluations Empower Learners***

This type of analysis shows how you can apply professional development to the tasks assigned by your manager. In this second evaluation, you are the person who is the most empowered within the organization when allowed excellence and integrity to evaluate the professional development programs. There is always room for improvement, and we should take

all input from various experts. Whether you are a member of an organization with a Black Caucus or not, you are one of our experts, and we value your opinions.

***Additional Resources:***

Short Read - [The 15 Steps Needed for Putting Writing Into Action](#)

**Optional: Discussion Question for Module Two**

Question: When completing the Level 2 evaluation, who is the most empowered person?

- A. Retired or currently employed learner
- B. Retired or currently employed learner in management
- C. Retired or currently employed leadership or Executive Board
- D. All of the Above

D is the correct answer.

Explanation: The member of an association with a Black Caucus is the most empowered person when completing the Level 2 evaluation. Optional to read the article [What is Employee Empowerment?](#)

**Check Out: Level 2 – Learning Evaluation (PDF)**

Level 2: Learning Evaluation

Directions: Please apply what you have learned about the Kirkpatrick Evaluation Framework (Framework). Thank you for taking the time to provide valuable feedback.

Questions
1. How do you feel about filling out more than one evaluation after completing a professional development program to determine your learning need for achieving a goal? And why?

2. How could an individual or organization use formal evaluations to create a strategy to achieve learning goals? And why?
3. How could the Kirkpatrick Evaluation Framework impact a sociocultural change for implementing a learning strategy? And why?
4. How could the Kirkpatrick Evaluation Framework assess the fulfillment for reaching individual goals, organizational goals change, or the training culture over the next several years? And why?

**Module Three: Behavior After Training**

*What could your leadership do with the evaluation results?*

*Leadership cares about Evaluation Analysis*

In Module One, we learned about Level 1 or Reaction evaluation. In Module Two, we learned about the Level 2 evaluation or Learning, and the primary person is empowered to know if the programming met your needs and the organization's needs within 3-6 months.

Module Three discusses Level 3 of the Kirkpatrick Evaluation Framework. Leadership cares about the results of your evaluation and how the results could be compiled to determine the next course of action.

**Video:** Georgetown Professors Read Rate My Professor – 5:21 minutes;

<https://youtu.be/C8A37ZlgudU>

The Level 3 evaluation aims to identify more competent and efficient ways to provide training. One way to meet an organization's objectives is to read, analyze, and apply the results of the evaluations. To build on what was learned in Module Two, through your changed behavior from professional development programming, you would be empowered to become a leader in the organization by carefully considering completing the evaluation.

Suppose you share with your manager that you have completed the Level 2 evaluation. In that case, your manager also has an opportunity to complete a Level 3 evaluation, which is a combination of multiple-choice or objective questions and essay responses. This is compared to Kirkpatrick's Model Level 3 or Behavior. Level 4, or Results, analyzes the data from the Level 1, Level 2, and Level 3 evaluations. Leadership could review and measure the outcomes of the evaluations in the Level 4 statistics to determine how practical the professional programming was for the learners and organization.

### ***A Journey, Not A Destination***

Now, we know how the evaluation supports learners, managers, and leadership. Of course, our work together does not stop; it is time for the leadership to reflect on the benefits of the knowledge gained from the professional development programming. This course shows how evaluations could help a learner collaborate with leadership, advocate services to enhance the customer experience, and educate on aligning professional development programs with the Bylaws, Mission, or objectives. Remember, the evaluation is a journey, not a destination.

**Optional: Discussion Question for Module Three**

Question: Does the organization care about learners' professional development programming evaluation results?

A. Yes

B. No

A is the correct answer.

Explanation: Yes, organizations should care about the results of learner's professional development programming evaluations. Supplemental Resource: [Evaluating Training and Results \(ROI of Training\)](#)

**Check Out: Level 3 – Behavior Evaluation**

***Level 3: Behavior Evaluation***

Directions: After a discussion with the learner, please indicate your level of agreement with the following statements and provide your comments.

Thank you for taking the time to provide valuable feedback.

Question	Strongly Agree	Agree	N/A	Disagree	Strongly Disagree
This course was directly related to the employee's job duties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please explain					
2. As a result of participating in this course, the employee was able to perform their job duties more efficiently.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How did the employee's skills improve?				
The employee has applied the learned skills on a regular basis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describe the way the employee has applied new skills.				

**Module Four: Fill out two Evaluations**

*Final Assessments*

Before you leave, you must complete the Level 2 or Learning evaluation.

- Optional: React to this course by downloading and completing the [Level 1 Evaluation](#).
  - You can email this evaluation directly to the instructor at [Redacted].
- Apply what you have learned by downloading and completing the [Level 2 Evaluation](#).
- Upload the **Level 2 Evaluation** below as the Final Assessment.

## Appendix K

### Journal Prompt



Title of Study: Learner's Lived Experiences for Filling Out a Professional Development Program's Formal Evaluation after Learning about the Kirkpatrick Evaluation Framework: A

Transcendental Phenomenology Study

**Responses after learning about the Kirkpatrick Evaluation Framework**

Four Reflective Questions:

1. How do you feel about filling out more than one evaluation after completing a professional development program to determine your learning need for achieving a goal? And why?
2. How could an individual or organization use formal evaluations to create a strategy to achieve learning goals? And why?
3. What would be the resources needed to implement either a professional development program resources about the Kirkpatrick Evaluation Framework or a multisource evaluation program? And why?
4. How could the Kirkpatrick Evaluation Framework assess the fulfillment or reaching individual goals, organizational goals change, or the training culture over the next several years? And why?



## **Appendix L**

### **Completed Consent Forms**

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

<b>Your Consent</b>
---------------------

*I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.*

The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

\_\_\_\_\_[ R edacted]\_\_\_\_\_

Printed Subject Name

\_\_\_\_\_[Redacted-No date]\_\_\_\_\_

Signature & Date

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

### Your Consent

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The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

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Printed Subject Name

[Redacted] 11/14/2023

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Signature and Date

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

**Your Consent**

*I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.*

The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

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Printed Subject Name

[Redacted] 11/14/2023

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Signature & Date

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**Your Consent**

*I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.*

The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

**[Redacted]**

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Printed Subject Name

[Redacted] 11/15/2023

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Signature & Date

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### Your Consent

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The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

---

Printed Subject Name

[Redacted] 11/15/2023

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Signature & Date



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### Your Consent

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The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

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Printed Subject Name

[Redacted] 11/21/2023

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Signature & Date

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

### Your Consent

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The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

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Printed Subject Name

[Redacted] 12/01/2023

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Signature & Date

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

### Your Consent

*I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.*

The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

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Printed Subject Name

[Redacted] 12/01/2023

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Signature & Date

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

### Your Consent

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The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

---

Printed Subject Name

[Redacted] 12/15/2023

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Signature & Date

By signing the attached document, you agree to be in this study. Make sure you understand what the study is about before you sign. You will be given a copy of this document for your records. The researcher will keep a copy of the consent with the study records. If you have any questions about the study after you sign this document, you can contact the study team using the information provided above.

### Your Consent

*I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.*

The researcher has my permission to audio-record me, with voice-changing software, as part of my participation in this study.

[Redacted]

Printed Subject Name

[Redacted] 12/15/2023

Signature & Date

**Appendix M**

**Journal Prompt Reminder Email**

Dear African American librarians, African educators, or members of an association with a Black Caucus:

This is a gentle reminder to complete the online self-paced professional development program about the Kirkpatrick Evaluation Framework (KEF) by filling out the [journal prompt](#), also known as the KEF's Level 2 evaluation as a participant in the study titled: Learner's Lived Experiences for Filling Out a Professional Development Program's Formal Evaluation after Learning about the Kirkpatrick Evaluation Framework: A Transcendental Phenomenology Study. The purpose of my research is to explore learners' lived experiences for filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick Evaluation Framework for participants who are either African American librarians, African American educators, or members of an association with a Black Caucus.

By December 2023, please complete the online self-paced professional development program about the Kirkpatrick Evaluation Framework by submitting the completed [journal prompt](#). Once received, you are asked to:

- Be observed in a one-hour audio-recorded panel discussion, with voice-changing software.
- Review the panel discussion transcript for accuracy. Return the transcript to me by email within 30 days of receipt.

Names and other identifying information will be requested as part of this study, but the information will remain confidential.

If you have any questions or concerns, please contact me by phone at {Redacted} or by email at [Redacted].

Sincerely,

Judine Slaughter  
Student, Liberty University



**Appendix N**

**Completed Journal Prompts**

**Participant Code: P1**

1. I wouldn't mind filling out more than one evaluation as long as I am able to recall the information I am supposed to reflect on. When life gets busy, if there isn't consistent exercise to ensure I've retained/applied what I learned, I am quick to forget. I know the model explains checking in more deeply in 3-6 months, but if there isn't any work done in between, I would definitely need a refresher.
2. You can use this as a benchmark to check in based on how the individual or group answers the questions. As above, if you do an early check in and later, you can see how well the information was retained or practices have been applied. If the result isn't what was expected, then going back and re-teaching the group or individuals would be done in a different way and then this data would be evaluated. You could also ask people what obstacles were in the way of them achieving the learning goals. Such as, were they too busy, or did they not understand the concept based on the way it was presented, or did they not understand the importance of the lesson and how to apply it? This would overall help the company build out lessons that are iterative to the learner and adjust to achieve maximum effectiveness.
3. The Framework could be the foundation of a community-based learning system designed to amplify how individuals learn to better reach collective goals of the group. Assessment can include learning style specific questions to cater the lessons. The evaluations can build on the iterative approach that makes sure participants are retaining and applying their knowledge, and the folks assessing the responses use the feedback to change to meet the group at their level.
4. I think that having benchmarks would assist with checking in on goal progress. Especially as there is turnover, you can look back on the assessments to see trends and learn ways to get

everyone on the same page. I think about situations where there is institutional knowledge that is lost when people leave. The assessments can serve in training to ensure that everyone is learning the same information and applying the same concepts as they progress in their job. As new employees enter the work force, this is also important because those who are new to having employment may not be up to speed like more established employees. This gives everyone an opportunity to learn. Additionally, changing the material as goals adjust is important so that the assessments are flexible as new concepts are introduced or various learning styles are accommodated.

**Participant Code: P2**

1. After taking this course, I would be more likely to complete a 2nd evaluation to provide additional and more specific feedback to the trainer. As mentioned in the earlier exercise, completing an initial evaluation is easy but a 2nd one, sometime after the initial course, and with more open-ended questions is more time intensive.
2. Since we are concerned with providing professional development to our users, we would want to evaluate if learning is taking place, are the main points of a session getting across, if members are able to apply what was learned and if it is making a difference.
3. A sociocultural change would occur when leaders intentionally collect, analyze the data, reacts and adjust learning strategies accordingly.
4. If the data is collected and analyzed, it could be determined that individual and organizational goals are fulfilled. It is not enough to offer professional development, but it is essential to determine if it is worth it and whether members are getting value from attending. Some of our programs are more theoretical rather than a step-by-step approach and it may be difficult to see if

the knowledge gained can be applied but we owe it ourselves and members to try and determine value.

**Participant Code: P3**

1. I am open to filling out two evaluations. At the end of a professional development program, I typically have strong feelings regarding whether or not I am going to use what I learned, and those feelings and thoughts are reflected in the initial evaluation. Completing an evaluation after some time allows me to evaluate how I feel about the programming now that I have completed it and moved back into my daily routine.
2. These evaluations can help organizations discover and evaluate what their audience knows and wants to know. This will help ensure that learning goals are focused, achievable, and meaningful.
3. Using this framework can help an organization move from being led from the top to being led by all. The framework allows individuals at all levels to provide feedback and leadership can use the data to inform future work.
4. As mentioned above, the data can be used to cultivate change. Good data will show how individuals are feeling, what they love, and what they hate. Consistently allowing individuals to provide their thoughts and perspectives will help ensure that all voices, not just the loud ones, are being heard.

**Participant Code: P4**

1. I am open to completing more than one evaluation, especially if I know the professional development program is being incorporated into my organization and will be an ongoing benefit to my organization.

2. Few months after the introduction of the topic and assigned task, the person/teams can share the results of their investigation and how the information acquired has been applied towards the organization's goals. This evaluation will provide firsthand information to the leadership of the time and resources used to advance the given topic. The information should be presented in short written formats to educate the organization's leadership and members on the topic or task assigned, reflection on the advocacy, nature of service, collaboration and how to engage differently. This process empowers the person/teams.

Incorporating a formal evaluation into an organization's strategic plan, such as the Kirkpatrick Evaluation Framework, can provide a more competent and

3. Framework to determine if and how the behavior of the intended learner demonstrated change within the timeframe and resource allocation. If not achieved in the timeframe and resource allocated, the person/teams can respond through a second evaluation challenges to accomplishments and recommendations to accomplish differently.

If sociocultural change is not stated in an organization's Bylaws, Mission or membership goals, or a stated institutional goal, the Kirkpatrick Evaluation Framework or no other framework will be effective. However, if sociocultural change is stated or implied, employing an evaluation framework, such as the Kirkpatrick Evaluation Framework is instrumental to determine the progress toward the impact of sociocultural change in accordance with the entity's founding documents, evaluation data and Goals.

4. Aware that organizational change does not occur overnight, the Kirkpatrick Evaluation Framework can be used with other tools to facilitate both individual and organizational goals and change. As a professional development tool, the Kirkpatrick Evaluation Framework provides

a framework (training, resources, timelines, etc.) for the organization to incorporate into its strategic and operational plans.

As a framework is implemented, an organization should establish itself as a safe harbor environment that provides ongoing opportunities for all individuals to contribute their voices on issues, topics of concerns, programs, etc. Once recognized as a safe harbor, members and or person/teams can respectively collaborate to address issues, identify, and communicate strategies that align with the organization's goals and measure their effectiveness.

**Participant Code: P5**

1. I would have been annoyed or flat out refused before I work through the training module. Knowing that I now have some context on the Kirkpatrick Evaluation framework, I would be less annoyed and more inclined to complete multiple evaluations. I believe learners should be made aware that the training will require them to complete multiple evaluations and how that benefits them.
2. I think both the level 1 and level 2 evaluations provide the organization with feedback about member engagement the training. The level 2 evaluation allows the individual to explain what they have learned. This information can help organizations work to achieve their learning goals by utilizing the data received in feedback to make the changes necessary to reach their desired outcome.
3. I believe this type of evaluation provides an accountability framework that supports sociocultural change by negating individuals and organization's ability to engage in performative of superficial change measures. This evaluation in conjunction with professional development and other assessments methods turns a learning strategy into a tangible goal with evidence-based results.

4. The evaluations provide information on what the individuals has learned, and manager observations on individuals changes in behavior related to the training which is provided to leadership to calculate the return on their investment.

**Participant Code: P6**

1. I only like to fill out one evaluation after a professional development program. If I'm asked to fill out more than one I lose motivation and I end up just giving the evaluator all 5/5 if I enjoyed the presentation regardless what I learned. Sometimes I just won't complete it at all if there is more than one.

2. In a formal evaluation it's easier to see a person's strengths and weaknesses. This helps you achieve your goal quicker because it's easier to focus on what you are actually doing vs. what you think you're doing. Formal evaluations help expose your weaknesses which helps with growth. Sometimes it's good to see yourself through another person's perception.

3. Kirkpatrick's evaluation framework can impact a sociocultural change because it help evaluate what you learned and how it has changed your behaviors. A lot of time change is temporary and because his method is over time and not immediate that give you time to see what information really stuck with you.

4. This can help you achieve your goals because it helps identify how you process information. It exposes what type of learning/presentations pearls your interests and if you are taught new things with your learning style you are more likely to retain it or make it a habit.

**Participant Code: P7**

1. I feel it's appropriate to fill out more than one evaluation. You can expose different learning skills looking back over them.

2. The formal evaluation is standard. It can be useful to both being straightforward.

3. The Evaluation Framework can be very useful. Being as though it gives different options and choices. It brings forth diversity to the different strategies that can be used.

4. It can be useful. The style of teaching and the way data is collected and received are changing. Being as though homeschooling settings are taking place in the public school settings. The style of observation and data is not as standard, so the Kirkpatrick Evaluation Framework gives options to different learning strategies.

**Participant Code: P8**

1. I do not like to take them because I often are a waste of time because I do not think the person giving the evaluation will actually read it.

2. It can be used to improve their learning goals by assessing where their gaps of communication may be.

3. It could help establish what needs to be done to improve learning strategy. This is important so organizations could improve to help their organizations grow.

4. It could be used to help improve culture by attending to the needs of who they are serving. The evaluation could be used to help improve their goals and better the company.

**Participant Code: P9**

1. I prefer one all encompassing eval as opposed to more than one eval.

2. Get a deeper understanding of learners' experience and needs.

3. Results would allow for deeper investigation/research of strategy vs. output/outcome.

4. Consistent implementation could lead to more consistent results, providing evidence for future planning/goal setting.

**Participant Code: P10**



1. I prefer to fill out multiple evaluations after completing a professional development program. I think the evaluation process is a crucial component in determining how effective the program was at helping me reach my goal. The goal is that the feedback provided in the evaluation form, will assist with refining the program to cater to individuals that have learning and comprehension styles similar to mine
2. Organizations can take the feedback provided on the evaluation forms, exact the responses to create long term strategies to enhance learning goals and processes that will drive better results.
3. The Kirkpatrick evaluation framework model provides a process to implement that will gauge the strengths and weaknesses of learning. The model also helps with understanding, measuring the effectiveness of learning and helps to identify the cultural and social factors that can impact learning.
4. The Kirkpatrick Evaluation framework model can assist with assessing the training culture in the future which can impact the learning strategies implemented.

**Appendix O**

**Focus Group Interview PowerPoint**

Benefits of Evaluation  
Judine Slaughter  
Student, Liberty University

## Slide 2

### Agenda

- Introduction
- Critical Research Question
- Reflection Questions 2 – 7
- Adult Learning Theory
- Reflection Questions 8 – 12
- Tell me your experience (13 – 14)
- A look ahead (15)
- Wrap Up (16)

## Slide 3

### Introduction

The purpose of this transcendental phenomenology study was to discover the learner's lived experiences for filling out a formal evaluation after completing an online self-paced professional development program (PDP) about the Kirkpatrick Evaluation Framework for participants who were either African American librarians, African American educators, or members of an association with a Black Caucus.

**Slide 4**

## Critical Research Question

Experts suggest that organizations often do not complete all four levels of the Kirkpatrick Evaluation Framework after professional development programs.

## Question 1

How aware were you of the Kirkpatrick Evaluation Framework before taking the online self-paced professional development program?

**Slide 5**

## Question 2

Please tell me the number of professional development programs you have attended that have benefited from an informal or formal evaluation.

**Slide 6**

## Question 3

Reflecting on previous professional development programs, what has been your experience, between your manager or the organizational leadership when completing an informal or formal evaluation?

**Slide 7**

## Question 4

Reflecting on previous professional development programs, what has been your experience after using an informal or formal evaluation for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders?

**Slide 8**

Pause for a minute

What else would you like to add to your views on taking professional development programs that we have not already discussed?

### **Slide 9**

Question 5

Reflecting on the formal evaluations after completing the online self-paced professional development program, what do you believe could be your change of experiences, if any, between your manager or organizational leadership on completing a formal evaluation?

### **Slide 10**

Question 6

Reflecting on a formal evaluation after completing professional development programs, whether online or in person, what do you believe could be your change of experiences, for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders?

### **Slide 11**

Question 7

Ideally, part of completing a formal evaluation might be a sociocultural change for the librarians, educators, and members of an association with a Black Caucus.

Where do you see yourself in this change?

### **Slide 12**

Adult Learning Theory

Adults learn by using self-direction to build on their experiences and knowing why and how the learning will benefit their lives. ~ Knowles et al

1. Determining the need

2. Creating a strategy
3. Implementing the learning strategy
4. Assessing attainment of learning goal

**Slide 13**

## Question 8

Reflecting on if a formal evaluation was offered after completing professional development programs, what do you believe could be your change of experience, for determining a learning strategy?

**Slide 14**

## Question 9

Reflecting on if a formal evaluation was offered after completing professional development programs, whether online or in person, what do you believe could be your change of experience, for creating a learning strategy?

**Slide 15**

## Question 10

Reflecting on if a formal evaluation was offered after completing professional development programs, whether online or in person, what do you believe could change your experience, for implementing a learning strategy?

**Slide 16**

## Question 11

Reflecting on if a formal evaluation was offered after completing professional development programs, what do you believe could be your change of experiences, for assessing the fulfillment of the learning strategy?

**Slide 17**

Question 12

Reflecting on if a formal evaluation was offered after completing professional development programs, what do you believe could be your change of experiences, for assessing the fulfillment of the learning strategy?

**Slide 18**

Tell me your experience - 1

Tell me about a time when felt uncomfortable sharing your knowledge about a professional development program?

**Slide 19**

Tell me your experience - 2

Tell me about the time you felt good in sharing your knowledge in your learning experience after completing a professional development program.

**Slide 20**

A look ahead

This next question is unique in that it will invite you to look ahead. From your experience of previous improvements to processes, if adopted, how could the Kirkpatrick Evaluation Framework change the training culture within the Black Caucus over the next several years?

**Slide 21**

Wrap-Up: Final Question

We have covered a lot of ground in our conversation, and I so appreciate the time you have given to this study.

What else do you think I should have asked about the online Kirkpatrick Evaluation Program that I did not ask?

**Slide 22**

THANK YOU

Judine Slaughter [Redacted]





**Appendix P**

**Focus Group Transcript**

**Researcher:** Thank you. All right, this is the Benefits of Evaluation panel discussion. My name is Judine Slaughter. Again, this is voluntary. You can drop out at any time. I do appreciate your participation. First, I am going to give you an introduction, then the critical research question, and reflection questions two through seven. The theory behind my dissertation is the adult learning theory. Then we are going to have some reflection and more reflection questions based on the adult learning theory. Then I would like you to tell me your experience, a look ahead, and a wrap-up. The purpose of this study was to discover learners' lived experiences for filling out a formal evaluation after completing an online self-paced professional development program about the Kirkpatrick evaluation framework for participants who were either African American librarians, African American educators, or members of an association with a Black Caucus. Experts suggest that organizations often do not complete all four levels of the evaluation framework after professional development programs. Question, how aware were you of the Kirkpatrick evaluation framework before taking the online self-paced professional development program?

**P4:** I had not.

**P6:** I wasn't aware of it at all.

**P5:** I had no clue of a Kirkpatrick Framework.

**P9:** Yes, me too. Never heard of it. This is the first time.

**P1:** I was not aware of this framework before the program.

**Researcher:** When I learned about it, which wasn't very long ago, it was my first time also. So please tell me the number of professional development programs you have attended that have benefited from an informal or formal evaluation.

**P6:** I used to be a teacher, so we had professional developments all the time throughout the school year, and I don't know, I guess I benefited from the formal or informal, honestly. I complete the evaluations just to do it because I usually just give them the best ratings.

Unless it was really bad and I don't know how much benefit they get from it, but I am never really that honest in my evaluations.

**Researcher:** Thank you. Does anyone else have anything they want to add?

**P5:** I was going to say that I have been on both sides of it as the person hosting the training and a lot of times really the evaluation is like a check mark that people attended. It would be nice if we had more information when I fill out evaluations, if I like the training and it is beneficial, I try to leave comments. Otherwise, many times it is just a rating system. I do not know if the benefit was for the people that gave the training, but for me, it is helpful because I need to know if there are things that need to be changed about the training format or did it take too long, just general things. But this framework goes into something different, a lot more in-depth evaluation.

**Researcher:** Yes.

**P4:** I am like Speaker 5. I have been on both sides, and this was a difference in that it is more longitudinal when people submit evaluations to me. I look at it as helping to build for the next workshop that I am going to do as opposed to coming back and evaluating the outcomes of the participants. I have not been in a situation I don't think, where I have had to evaluate the outcome of the participants or of the organization except recently there have been a few that I have professional development programs that I have been a part of that I have personally benefited from them from the activities, but it wasn't from any evaluation that people provided other than my own evaluation.

**Researcher:** Okay. Thank you.

**P9:** I was going to say like the first person I have taken loads of professional development courses and I just do the survey similar to what they said. I tend to rate it positively. I cannot remember any outright terrible professional development experiences, but like everybody else, I am not sure what was the impact of the actual evaluation itself, though I have not been on the, I guess the evaluator side of professional development programs. I mean professional development surveys. I have been with the public as a librarian but not at the backside of professional development sessions.

**P1:** Most of my professional development training in which I am supposed to learn a new skill has been through webinars. They've been provided by my work through a 3rd party provider, and it's been a quick rating from a few days or so after the program. All other training on the job has been informal where someone shows a group how to do something or it's a one-on-one, but no one comes around after to make sure you remember. I don't think there's been a great benefit overall to the "formal" evaluation because it feels so detached from the instructor and the service provider. I will say that the informal sessions could have benefited more from evaluations because I don't think that those trainers were often the best, but if they knew how to get better then maybe people would have a better time remembering what we were taught.

**Researcher:** Thank you. Does anyone else have something to add? Let us go to the next question. Reflecting on previous professional development programs, what has been your experience between your manager or the organizational leadership when completing an informal or formal evaluation? This is like question two, it's just that instead of your reflection and how it

benefited you, did you have any conversations with your manager or their organizational leadership or did you see anything different from informal or formal evaluations?

**P6:** Not in I guess a professional development program when you bring in a manager or an organizational leadership. I know for example, not too long ago I started a new job and this job, they did not have Juneteenth, we were not off for Juneteenth and so after three months they sent out a survey. I guess sort of similar to professional development and I had to rate the job, Independence Day had to put, is there anything that I have concerns about or I would like to see change and I put that if we are off for independence day, we should be off for Juneteenth because it's the same type of celebration. And this year they made sure that on the first they put out this new calendar and they had added that we got Juneteenth all. I felt like in that instance I was heard, but that's not necessarily a professional development. But I did learn many things while I was at the job.

**Researcher:** Thank you.

**P5:** My experience for managers and organizations, we did a lot of DEIA (Diversity, Equity, Inclusion, and Accessibility) training. I actually just switched jobs too. I left a predominantly white institution. I feel like it was the song and dance of diversity they were not doing that this is needed for your study. There was a lot of push for diversity, equity, inclusion, accessibility, and professional development. One of the things that we all were required to do was this anti-bias hiring practice. And I found management was gung-ho about making sure that everyone did it. We had to have our certificates. But then when it came to, and I was on the committee, I need to preface that I was on the diversity committee, somehow, we always end up doing the work.

**P5:** When it was time to put the DEIA in practice, it's like everybody should be on the same page because we all went to the same training and there were these things that specific things, they told us not to do, and to do and it wasn't being practiced. My experience is just like with professional development as far as organization, it is something to say, oh, we had everyone do this. We can prove that everyone did this, but they don't actually follow up and implement or see that it's being, I am saying, practiced across the board.

**P4:** In a previous institution, they decided that we had to do a report, some type of written report from professional development activities, and I happened to be at a conference in Pittsburgh. And as I was preparing this report, which I didn't want to do, I felt it was busy work. I said all the people that I work with may never have the opportunity that I am having of traveling and going to these activities. I put my report almost in the form of a newsletter. I think it was maybe two pages if that. But I tried to make it concise. I talked about the conference activities, and which presentation stood out to me. Then I gave a little bit about the history of Pittsburgh because people may have been on the West Coast. My coworkers may never get to Pittsburgh, and it generated lots of feedback from the rest of the staff, positive feedback because they learned something not only about the conference but also about the city and the community there. And I included a couple of pictures and graphics in it. It may have been two pages, but I tried to keep it to one page. I just sort of turned around the task on my managers because what they were doing was busy work to me initially with no guidance in this. And I just turned it around and put it in a different light for the people that I work with as well as for myself.

**Researcher:** Thank you. Does anyone else have something to add?

**P9:** Speaker 4 made a good point about the guidance. I feel like with professional development from the managers and the organization, they are like do this, but they never really say what you are supposed to do with it, and going through your training it's obvious that there should be some other steps if it's going to be helpful, especially seeing how it's implemented.

**Researcher:** Thank you. I hear that you can have professional development and you can have some type of evaluation, but you would like to see more involvement. Speaker 6 did have involvement from management; however, Speaker 5 would like to see a little more involvement with the organizational leadership as far as the professional development programs.

**P6:** I would like to add, even though I had involvement that time, in general I just feel the same way. There is no outcome. That's why I tend to, when I do the surveys afterward, to just rate well because I just feel like it's not going to change.

**P4:** But at some point, I got almost cynical in life that sometimes we must find a way to make it work. Leaders, sometimes managers, may not know how or they may not know what they want from you and other employees than giving you something to do. But often I would talk to my colleagues, I would share, even though I have given them the information, I would share with them how we could benefit as an organization and what we could do a little bit differently that would lead to a different outcome. Sort of like the little rabble-rouser, trying to think, go around, and talk to other staff members in sharing with them and help how this information can help our organization.

**P9:** I know for my organization we do not get too much follow-up on conference notes. I know that we do get a decent amount of funding for professional development activities from our state library. I know that part of a requirement is that we write back, we share notes so they can use it



for grant reporting purposes. But also wanted to add, but I do remember one time when there was a professional development survey on the front end. Our regional library, which is where we do a lot of training, sent out a survey, I think it was as simple as a Google form asking what type of professional development training needs, we had, and they let all the staff of the regional library systems take it. Then they used those results in the following years for some of the training courses that they designed. That is where I have seen the impact made on the front end. They surveyed staff on what professional development-type courses they would like to see.

**P1:** The previous speakers' comments resonated with me regarding the idea of professional development as busy work. There is often a lack of follow-up on the manager or organization's end when we are tasked with attending training or conferences. Only in some committees or working groups that were/are related to some professional development did I see people being asked to evaluate their experience. For example, at my previous job, I was in an interest group around resource sharing for our university libraries. Someone who attended a virtual conference reported back what they learned and gave our group some next-step tasks to consider based on what they learned. Additionally, someone else in that same interest group went to a different conference and was given a list of questions to ask while there to report back on. They came back with some answers and those were written into an action plan. However, at that same job, I attended diversity training and there was no direct follow-up from management to make any changes nor enforce that all staff attend the same training (I was a manager, so it was folded into other training courses). My point is how are some people learning important skills, but others are not, and how is upper management being consistent? It

was giving mixed signals. At my new job, I went to a conference and we're moving quickly on some things a colleague and I learned there. It's a big change from some past places where they didn't really support you in trying what you learned.

**Researcher:** Thank you. I appreciate that comment. That fits in. What else would you like to add to your views on taking professional development programs that we have not already discussed? Does anyone else have something that they want to mention? We have covered a wide gamut, which I do appreciate.

**Researcher:** Reflecting on previous professional development programs, what has been your experience after using an informal or formal evaluation for ensuring the current and future generations have the appropriate knowledge, skills, and abilities to be promoted as the next leaders? I think the person who mentioned that they just took it upon themselves to find out how a program benefited others as it sounded as if that person was more senior and said, we have taken this program, let me find out how it can help our future leaders. Let me know if I am correct or not.

**P4:** Yes, you are. I have taken some things outside of my organization and done conference presentations, even something as simple as a lightning talk, with five minutes or so to a full-blown conference proposal presentation. I think that some things could be incorporated into a policy or a procedure. Those are some of the things that I have done to assist others. But sharing the conference activities is probably the best. I have not written anything in a few years, but in my presentations, I try to also not just to do it for myself but to make it a panel to include others so that they can also share their experience.

**Researcher:** Thank you. Does anyone else have anything that they want to add to this?

**P9:** I am not sure if it fits in, but in my previous role, I did a lot of scheduling professional development internally for staff. That was peer-to-peer training with other librarians. Sometimes we brought in outside trainers, and we did get solicit feedback and evaluations, as informal as, how did you like it? And I know on one occasion we had a guy that came in and did a training on Steven Covey's Time Management Strategies, a four-quadrant system, and the staff. That was one situation where people were using or applying the training knowledge, they got in the professional development program. It came back up in a manager's meeting that they wanted us to do it again. We had new staff come on and so we had the trainer come back out and we applied the feedback we had from the first time. He came back for two years before the pandemic, and he came and did it virtually during the pandemic. I thought that was one situation where the evaluations definitely allowed us to take the training to help shape the training for new staff to make it better for them. I think to the benefit of professional development it really should be about the intention behind what we're doing. I've been to conferences, webinars, and workshops, but once I come back to my regular job, it doesn't seem like management maintained any follow-up on what was learned.

**Researcher:** Thank you. Yes, that's great. I really appreciate that example. Does anyone else have something to share? Okay, now we are pausing. We did and the pause helped us when we went back to question number four, unless somebody else had something else to say. I am going to go ahead to question number five. Reflecting on formal evaluations after completing the online self-paced professional development program, what do you believe could be your change of experiences, if any, between your manager or organizational leadership? I think that last example was very good because management said they really liked the four quadrant and if I

heard correctly, the presenter came back and refreshed everyone and the new employees so that everyone could be on board with the four-quadrant system. Let me know if I am correct or not.

**P9:** You are correct, and I still use the four-quadrant system.

**Researcher:** That sounds great.

**P5:** We'll have to have you do a presentation for the four quadrants.

**Researcher:** Yes, that's a good idea. Okay. Does anyone else have something that they would like to add to this question? I don't want to keep you longer than one hour. Reflecting on formal evaluations after completing professional development programs, what do you believe could be the change of experiences for ensuring current and future generations have the appropriate knowledge, skills, and abilities? We have one example where we did see a change, but reflecting on your experiences, do you think there could be other changes for future generations?

**P9:** Future speaking from an organizational perspective that I am currently working with, I am sort of using this, not a formal process at this point, but using it as a way for empowerment, encouraging the people that I work with to take control of their area to help guide the organization. I am empowering them to move ahead basically we are rebirthing an organization that structurally allowed some things to fall by the wayside. It is almost like a new group with a couple of old people in there. We are reshaping some things by posing questions that they have in their particular area and allowing them to come to me, they ask how we should do this. And I am saying, these are the questions that possibly could be considered in your team then be able to make a recommendation to the rest of us.

**P4:** It's encouraging them to do the research, come back, ask questions as needed, and then go back and hash it out and come up with a recommendation that empowers them to go to the next step. It's not formal in that it's written, but it gives them the experience or opportunity to make decisions and move the organization ahead. I am also looking at, based on that information, putting something so that when the next group of leaders are hired, we have an infrastructure in place that would include working with the secretary of State, working with IRS. What are their responsibilities as an organization so that you don't fall by the wayside again? It's not formal that it's written, but it's informal that we are having the outcomes. Basically, they are telling me what their challenges are, I am feeding back, these are some of the things we should consider and then they hash it out and we go to the next step.

**Researcher:** Thank you. Does anyone else have anything to add? We are going to go to the next question. Ideally, part of completing a formal evaluation might be a social cultural change or librarians, educators, and members of an association with the Black Caucus. Where do you see yourself as this change? And I might use Speaker 4, just for example. Not necessarily after completing a formal evaluation, but took what she already knew, and asked more questions to help the future. I am going to say the future generations but let me know if I am correct on that or if you have something else you want to add.

**P4:** No, that's correct.

**Researcher:** Okay, thank you. Is there anybody else? Where do you see yourself as a change agent or transformational leader?

**P9:** I feel like the nature of what I do already as a librarian and I deal with technology, I am always dealing with change. I think that one thing with a formal evaluation is you can go into it because you are going to have to design something prior to the training. You can go into it with

the outcomes you are expecting and kind of make questions or an evaluation around what you are expecting. And then if you do not meet your expectations, you also have some feedback on what can be changed. The formal evaluation is a good thing, and I would be totally for it.

Pushing this to let us do these formal evaluations so that people are not wasting their time doing professional development that may not benefit them. I find that professional development that I pick and choose for myself is more rewarding than what's kind of assigned as a general thing for the organization.

**Researcher:** When you pick and choose for yourself, have you ever gone back and asked them or said, listen, I took this, I think it might benefit everyone else?

**P9:** Yes, I have. A lot of times if it is something I really enjoy, I'll share it with colleagues, especially the recordings, and I would be like, hey, this was good training, and tell them why it was interesting. I tend, even if it's things that I haven't attended if I find something that I am going to attend, I will share it out with my colleagues, and just be like, you might be interested in this. We are all on different listservs and stuff, so what is the niche for my job might not be for another, but that doesn't mean another librarian isn't interested in it.

**Researcher:** Yes, definitely.

**P9:** This question kind of makes me reflect on the organizational leaders and planning or giving staff enough time because one thing I find with professional development, it could be really rewarding as a prior speaker just said, but if you don't have time to nurture and try to implement what you learn, it just goes back to the everyday routine. That is just something I was reflecting on as I was rereading your question.

**Researcher:** What I think I hear you are saying is that even though you fill out an evaluation, if there is not more time to implement a change, you'll see that you and others just continue

doing things as they have been doing?

**P9:** Correct.

**Researcher:** Okay. Does anyone else have something they want to add?

**P2:** I would just add that the benefits of a formal evaluation within your question, I am not sure it's so much as sociocultural change, but when evaluations are done well and it's just not perfunctory, you check in the box, depending on your role, you certainly can learn a lot from them. And I would agree that even though you do need time to read them, to absorb them, to react to the feedback and reacting to the feedback and making some kinds of adjustments. If you are the presenter, and you want what you have been presenting can be effective. But then unless you do not have the mindset that you want to improve from it, you are probably inclined to do the same thing the same way again. Having feedback is good, but then actually making the time to benefit from it is not necessarily going to happen automatically.

**Researcher:** Okay. Making time would be the sociocultural change where you have an evaluation, a formal evaluation, making the time to review it, does take time to review and to see if any changes could be made. But depending on your role, you can. Speaker 5 made a change just on her own. Thank you, thank you. But it is a time-consuming process, not only time reading, but even time implementing if you would agree to any recommended changes if that's what you mean by time.

**P2:** Yes, I agree with that comment. And I think we also have to have something to measure what are we evaluating, for example, is it a goal, is it an activity? And linking the evaluation to whatever the goals are, outcome expected outcomes of the evaluation that the employees can see a relationship as the organization goes about making that change.

**P1:** I have not been on the receiving end of evaluation, but I do agree with those above that if given time to provide thought to implement change from a thorough evaluation then the impact can actually be seen. My previous job required that we spend 3 days out of our year doing professional development, but it was not like a lot of the operational staff had the time to dedicate to it, so it made it difficult. And being short-staffed made it hard to sustain any efforts to try to act on professional development. Evaluations were sent off to 3rd party providers, so it wasn't like they came back to check in on participants or talked to our supervisors to make sure we paid attention or applied what we learned. There was no follow-up. And in our performance reviews, it only really mattered that we documented that we participated in professional development but not a deeper evaluation of the content or context. It was definitely more so to check a box.

**Researcher:** Thank you. From the next slide about the adult learning theory, adults learn by using self-direction to build on their experiences and knowing why and how the learning will benefit their lives. We have determining the need, creating the strategy, implementing the learning strategy, and assessing the attainment of the goal. You can see the adult learning theory is similar with four steps similar to the Kirkpatrick Evaluation Framework. Reflecting on if a formal evaluation was offered after completing professional development programs, what do you believe could be your change of experience for determining a learning strategy?

**Researcher:** And I think, again, Speaker 5 has already mentioned that their change was to just step out and ask questions to other employees. Speaker 9 said before they even took the program, the management or organization sent out a survey to find out what kind of training everyone would like. Right there, we are helping to determine the learning strategy. Speaker 3 said they took a program that wasn't necessarily required and brought the information back to their



coworkers. That really is a form of determining the learning strategy because you say, hey, I found this beneficial. It is not something that we need to take, but here I think you would benefit from this. Let me know if I am right or wrong.

**P1:** We almost had this happen at my previous job. There was an attempt to build in more cross training in our department and we had a survey monkey go out to anonymously find out what people felt like they wanted more training in. I think some may have been worried it would mean they would have more work to do, but it was to be able to help teach others about what we all do so we knew more about our roles. Anyway, the department head never followed through with coordinating it, but there was some interest overall in folks knowing what others did. I think that the first step was helpful, but it went back to the follow through.

**P4:** I tend to agree with you, but the way you just phrased it, I could see people getting upset. How do you know what's good for me? How do you know what I know my job? I mean, I can sense that in people a lot of times the way you have just phrased it, but I look at, as you just said, in your determining the needs as an assessment and maybe a joint assessment by the group. As such, in my previous position, we wanted to do something with workshops to meet the need. We needed to address the informational needs of our students. And we were receiving questions, looking at our emails, and listening to our voicemails. We saw that people were contacting us outside of our work hours and we needed to be able to address that. And we sort of looked at our students, looked at our programs collectively and found a way to address that need.

**P4:** And by doing some drop-in workshops, pre-recording some things, upgrading our FAQs, I mean sort of looking at the whole gamut of things. And then from a technology perspective, not all of us were on the same page and they made some decisions about

technology and being able to use it for all of us to be on the same page. We also recognized we had people who were not technologically adept. Some did not want to touch certain things in technology, but we needed to be able to move everybody forward so everyone could participate. We did a lot of partnering and peer work so that all of us could fill in at any point for anybody on the basic thing. We set a criterion, and we did that collectively within our department to advance the entire group. And we were able to evaluate each step of the way and actually we prepared a presentation from that. That was our way of determining our strategy, how we were going to address this need, and what we needed internally to do. And then the outcome of it was feedback from our students looking at the numbers to see how those particular questions decreased over time.

**Researcher:** Okay, thank you. I appreciate that example. I am going to go ahead to question nine. It's saying, but what do you believe could be your change of experience for creating a learning strategy? We have touched on this. Does someone have something that they would like to share?

**P5:** I think for me, if you are going to training, knowing that you are going to be required to do a formal evaluation, I think it does change for me how you are going to take in the information. It is going to make you a little more attentive. I was doing OER (Open Education Resources) training. We knew we had to complete an evaluation to complete the program. For me, I felt I wanted to learn this information, but I also knew that they were going to provide an evaluation afterwards. I felt like I was more invested in the program knowing that for me to get full completion of this program, I am going to have to evaluate and not like a quiz, but I am going to have to complete this evaluation. It was not right away that we had to do it right after the training, but we did have a time limit and those nagging reminders to do it.

**P9:** And I think that changed my perspective of an evaluation. I think if I went into it where it's like, oh, the usual and the evaluation is not mandatory, I feel like how do you feel about an evaluation? What did you get out of it? But this evaluation was more about touching on, I think what you are trying to get at, which is how would I implement this because I was training to teach others about OER, so that evaluation was like I had to explain what my strategy was to teach other people about OER. And I think knowing that you are going to have to do that level of evaluation does change how you interact with the training program.

**P1:** I haven't had this experience, but I feel the same as Speaker 9 where if I am aware of the intent and impact of the evaluation, and that there will be one to begin with, then I am ready. I try to stay as attentive as I can during training for when the assessment form gets emailed to me like a week later.

**Researcher:** Nice. Thank you. I really appreciate that. If no one else, I am going to go on to question 10, which is basically the same, what do you believe could be your change of experience for implementing a learning strategy?

**P4:** I would like to work with people to help them recognize the need to move on. As long as there's not an emergency, as such a directive that we have to do it yesterday because we can put something in place, a manager can put something in place, but unless it's critical or the rest of the group sees it as something that's needed, they are not going to be vested in it. And I like to work with people to get their interests, get them involved, helping them to recognize the challenge and how we are going to deal with it. It is a collective type of activity that we get to the learning based on what it is, what the challenge is, and then what we want as an outcome and how should we address it. It is more of a collaborative thing where they have bought into it.

**P4:** Based on, well, not just me working with people, but I also attended a workshop many, many years ago put on by the Kellogg Foundation and they said it takes five to seven years to move an idea. I mean, I was floored. It takes one to three years for people to get on the same page with you. You think about if you are a visionary or one of those, what do they call it, early adopters? You are out there, and you are implementing change, and you are like, why isn't the rest of the world here? Well, you are on page three, and they have just got the book for the first time. And you have to figure out how you are going to help them move to that level. But you are already on page 10, and they may be on the preface. It is that one to three years to get them on the same page and then basically the next five years, five to seven to help them move ahead.

**P4:** So often what I do is I will see what the challenge is, I'll write it, I'll verbalize it, and then I'll say, what do you guys think? How would you address this challenge? I am not giving them an answer but giving them something to think about. And I also learned in that is that once you write something or say something, you don't own it, you give it away, let others pick it, pick at every little comma, every little word. And once they finish with that, they have bought into it because it becomes their document and then they are ready to act on it. And so that to me is how, unless something of a critical nature needs to be done yesterday, that is how I help develop my learning strategy and implement it.

**Researcher:** Thank you.

**P1:** I think as a former manager, hearing Speaker 4 is inspiring and helpful to think about whenever I'm presented with an opportunity to lead again, and then in turn thinking about that as a project manager in my own work to assess ways to problem solve. I think overall, something I learned from when I was a supervisor to now is coming away from a project with lessons learned which in a way is like an evaluation. It was usually informal, but a conversation on what to think

about in case we have another project like it in the future. For instance, at my previous job, I was in a consortium, and we migrated to a new resource management system and went through an upgrade after launch we talked about what could have gone better and created a checklist to go through the next time to follow some steps before we announced to our patrons that the system was ready again.

**P4:** With the knowledge of not owning the document; It eased my frustration.

**Researcher:** Yes. Especially knowing the time that it can take to implement change. Thank you. I really appreciate that. That is useful information for all of us. Question 11, based on the same thing, what would you believe could be your change of experience for assessing the fulfillment of the learning strategy?

**P4:** Smiles on learners' faces, and behavioral changes.

**P6:** That is a good one. I was going to say it needs to be more interesting. You need to be passionate about what you are training.

**Researcher:** And even the informal emojis during the training, if those are offered in the chat. Those reflecting, it says reflecting on formal evaluations, but if you kept a recording of the chat and the training, then that could become part of a formal evaluation. These next two questions are for you to tell me about your experience when you felt uncomfortable sharing your knowledge about a professional development program.

**P9:** I don't think I have ever felt uncomfortable sharing anything that's professional development unless it was a manager that didn't want to hear it or was trying to put you on the spot. I personally don't feel that I have felt uncomfortable sharing any of my experiences.

**Researcher:** That's great. I am glad to hear that. Anyone else?

**P6:** I have never felt uncomfortable, but I will say I have been to professional developments where I thought it was good, but I know if I brought it back to management, it would fall on me to implement the changes. I just did not mention it. I might have told colleagues, but I didn't take it back to management because I knew I would be the one who would have to set up how we are going to implement this or make the change.

**P4:** Shame on you for not sharing.

**Researcher:** You did feel a little uncomfortable because you felt as if you did share then that would put more workload on you.

**P6:** That has happened in the past. But I would tell my colleagues about it too and they would be like, no, don't do that. Do not tell the management. And I am like, okay, I am not going to.

**P9:** I was going to say I have never felt uncomfortable, but I can definitely see where Speaker 6 would have not said anything. That would make me uncomfortable if I was going to be the workhorse just for sharing information.

**P1:** I have only felt uncomfortable when training regarded things like racism or were for people who are BIPOC (Black, Indigenous, and People of Color). In those spaces where the participants are meant to be in a safe and vulnerable space, I had to be very careful because I was speaking with white people about the experience and understand they are not going to be able to hear what was said because it was discussed in confidence but overall it can be a touchy subject for some of the people I was around.

**Researcher:** Yes. Okay, thank you. Tell me about a time when you felt good sharing your knowledge and a learning experience after completing a professional development program.

**P6:** Speaker 9 said when they were able to select their professional development, it was more effective. And when I was able to select my own professional development, I would love to go

back and share what I learned if it was something I knew we could benefit from, and it wasn't going to be just like say I was a teacher, I taught math. If I learned a new skill or learned some new method to something, I would take it back and share it with my colleagues. That way if I thought it was something they should implement in their classrooms.

**Researcher:** Okay, thank you.

**P4:** I think I have felt good about the majority of my experiences, and I love to share because I have had the opportunity of picking probably all of my professional development activities and some, I have actually sort of stood on the table to attend. Even if it was out of my pocket, I did not necessarily need management to pay for it, just give me the time. And I have always felt strongly enough about it to come back and share with others regardless of the format. Not that I wanted to implement everything because that professional development was for me, but I did want to share my experience in activities. There have just been so many opportunities that I have had that I just felt like I wanted to share all of them especially if it's something that that we did together as a staff, and I took the initiative to maybe do a conference presentation off of it or to encourage us to write something. I cannot say that there's no one experience. It's sort of multiple experiences that I have had that I want to share. I realize not everybody wants to share their activities or even wants to go on professional development activities, so I just feel like I want to share; I need to share.

**Researcher:** Thank you. And it sounds like it is an internal motivation when you are sharing, because as you mentioned, some people don't care to share, but you, in particular, have an internal motivation that if it's something good that will benefit others, then you want to share. Thank you.

**P4:** Yes

**P6:** I would agree with that too.

**P2:** We have an experience in my workplace similar to, Speaker 4 mentioned writing about her experience, but when you go to large conferences and there are so many different things to choose from, not everybody can go to the same thing. We did share informally as a group, not through management or anything particular, but decided that we did want to meet and just talk about any of the various things that we learned from any. Particularly a program that seemed to resonate with us or with that person that maybe somebody else didn't get to attend. And it generates a lot of conversation and interest and follow-up because again, at those conferences, you can't attend everything. Sharing the information broadens your experience a little bit because even though you didn't go to something, you did get a little bit of understanding of the quality of the presenter and that kind of stuff that you could look for.

**Researcher:** Thank you. Yes, that's a benefit.

**P4:** In previous jobs, I would go to the ALA (American Library Association) conference and I would bring back things from the vendors as well as the conference and I would share those with the staff. All the vendors have goodies, so I would bring the goodies back. I might have a synopsis, I would put the conference book out so they could go through and see some of the different activities, but just being able to share the resources that I had stimulated conversation and interest. That is one of the ways that I shared my activities as such.

**Researcher:** Thank you. I am going to go to the next question. This is a look ahead from your experience of previous improvement processes, if adopted, how could the Kirkpatrick Evaluation Framework change the training culture within libraries, within education, and within organizations with a Black Caucus over the next several years. P 4 has already informed us that it



takes about five to seven years before anything really is adopted. We just have one more question, but does anyone have something that they want to mention from this?

**P1:** I would just say that it has to be done with intention, but it can be an effective tool. The model looks good in theory, but it's the follow through that I think some institutions suffer greatly from. I also think that understanding how to apply the value meaning to the participant is important. There are so many training courses out there, but like others have mentioned, it really means more when you want to be there and have a genuine interest in the purpose of the training or outcome.

**P4:** I think it's not just training. I think it's a combination of things. And the Kirkpatrick Evaluation Framework can be a model because we are looking at what are some of the challenges and we are embarking on a new strategic plan. They have had a change of management or leadership, especially let us say in the position of treasurer. We have had one treasurer for a very long time. There is a new treasurer. It is a new focus as such. We are in a learning cycle with all the officers except for, let's say the vice president gets a two-year training or something like that. Two-year leadership mentorship before they advance to the next level. And then looking at if they look at their strategic plan and how they are reaching out or whatever their goals are, and then to be able to see what kinds of behavioral measurements that they are going to use to get those behavioral changes.

**P4:** That's what I am looking at for the organization that I am working with, which is one of the affiliates, is that we see reaction; we know what the challenges are, and now we are in that learning curve and how we are going to start to address those things, reevaluating our goals as part of that learning curve. And then to see if there are behavioral changes, not only within the organization but within our membership and present membership, future membership, and

networking. And in another, basically every couple of years we will be looking at this. We can evaluate it year by year if we want to, but I think we have to have specific goals for us to deal with and that is what we are working on or dealing with those specific goals. And last year, I have to say under the previous leader, we identified some things. We were able to advance them, and we felt good about it. And now one of the things for communications, we are getting feedback, positive feedback from our increased communications via multiple networks that we are using for our state organizations.

**Researcher:** Nice. It was not necessarily with the Kirkpatrick evaluation, but it did stem from some type of evaluations that were done. Is that correct? Yes.

**P4:** Yes.

**Researcher:** Nice.

**P9:** I was going to say that for me, I look at this question, and I really think that the improvement that you will see is that if you adopt this Framework, there is a way for you to kind of quantify the impact of the training. With this Framework, you can kind of gauge if it is meeting the needs of your members, but also, I am saying, are you getting the outcomes that the training is intended for.

**Researcher:** Thank you. That is true. Anyone else? Okay, we have one more question, a wrap-up. What do you think I should have asked? We have covered a lot of ground. Is there anything I should ask about the program or about the online professional development program that I didn't ask?

**P1:** Thank you for the panel. It was nice to hear everyone's responses. It really resonated with me with some of the responses. I'm sensing a theme that things move slowly and sometimes people are overburdened even though we are inspired to take action on

what we've learned.

**P4:** For me, I would say I think you have asked the right questions from my perspective.

**Researcher:** Thank you.

**P6:** I would agree. I thought it was a great discussion and I felt like the conversation naturally flowed from the first two questions and gave us answers to the other questions. I thought it was very well done.

**Researcher:** Thank you. One thing I didn't mention is that I did have to create a mobile app version of the training of the program, and I used one of the videos as a CliffsNotes version. Speaker 4 mentioned how sometimes you do have to switch up or change the type of training when you go back and retrain. And I just want to mention to make sure everyone was on board; I did have to make those changes. Nobody asked, but I am just letting you know that I did. Sometimes you do have to make changes when people are asking questions or they have a need, you do as a presenter have to modify. And I did.

**P4:** I think that's important because not everyone uses a computer. Some people do a number of things on their phones and when you see things on the computer screen versus your phone, the format is different. So that's something that we all need to start looking at as we develop online programs.

**Researcher:** Yes, that's true. Thank you very much. I am not going to hold you any longer. If you have more that you want to share, I have my liberty email there. So again, thank you.

## Appendix Q

**Researcher's Journal Prompt Observations**

**Participant code: P1**

1. Scheduled or unscheduled observation: Unscheduled
2. Researcher is non-participant observer: Yes
3. Duration of observation: 30 minutes
4. General Observation: Completed MOOC on November 27, 2023. Sent a discussion post.

*Question 1:* Agree to completing more than one evaluation to determine the need; however, feels the suggested time of 3-6 months could be too long for the learner to remember what was learned.

*Question 2:* Feels can use evaluations as a benchmark to create a strategy. If learners don't provide the expected results after the second evaluation, determine the obstacles. The instruction could be revised, and the learners retaught.

*Question 3:* Feels framework could be a foundation for a community-based learning system to implement a strategy on how different people learn. Formal evaluations could have an iterative approach to make sure the learners are retaining and applying the material.

*Question 4:* Feels assessments can assess fulfillment that everyone is learning the same information and applying the same concepts as they progress in their job. As new employees enter the workforce, this is also important because those who are new to having employment may not be up to speed like more tenured employees with tenure have institutional knowledge which can be shared.

5. Keywords: benchmark, results, foundation, iterative approach, same concepts, new and tenured employees, workforce, institutional knowledge, determine need, create strategy, implement strategy, assess fulfillment, agree

6. What went well: Participant completed the PDP within 5 calendar days. This includes a winter holiday weekend. Shows participant was invested in the study. Participant posted in the discussion: I have participated in professional development webinars and self-guided work. I found the evaluations seemed to be feedback to the program facilitator to learn what was effective, how to improve, or if there was an opportunity for future development based on learner needs. While evaluations always take a few minutes to complete I do so hoping that my time is valued and that there are people on the back end really looking at the responses and using the feedback to improve the program.
7. What could have gone better: Participant sent me an email to let me know the first optional quiz was not providing the correct answer.

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**1. Participant code: P2**

2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Yes
4. Duration of observation: 30 minutes
5. General Observation: Completed MMOC on November 27, 2023. Participant agreed to reenroll into the course, because I had included the Level 2 evaluation as an assignment before I had enough participants.

Question 1: Agree to complete a second evaluation determine the learning need. The first evaluation is easy; however, the second evaluation is more intensive.

Question 2: Feels the organization could use the training to create a strategy. The organization wants to know if the learners can apply and make a difference in what they have learned.

Question 3: Feels a sociocultural change would occur as leaders would have to intentionally collect, analyze, and readjust training where necessary.

Question 4: Feels some trainings are more theoretical and not step-by-step; however, leadership owes it to the membership to implement strategy and determine the training value.

6. Keywords: More feedback, intensive, feels, apply, make difference, intentionally collect, analyze, readjust, training try, determine value, level 2, evaluation, determine need, create strategy, implement strategy, assess fulfillment, agree
7. What went well: The participant completed the PDP within 5 business days and showed an interest in the study for professional reasons. She posted a discussion comment: Evaluations help the presenter improve the presentation and understand what the learner found to be most important. Evaluations help the learners to focus and encourage them to apply what they learned.
8. What could have gone better: It would have been different to have all participants start the PDP at the same time, similar to a regular face-to-face course.

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1. **Participant code: P3**

2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Yes
4. Duration of observation: 20 minutes
5. General Observation: Completed MOOC on January 10, 2024. Last but not least

Question 1: Agree to more than one evaluation to determine the training need; however, life can get busy and if the material is not kept up front and center or used in the day-to-day actions to retain and apply the learning, then it will be easy to forget what might have been learned. If the



material is not applied within 3-6 months, then the participant would recommend a refresher course.

Question 2: Feels organizations can use the Framework as a benchmark to create a learning strategy. However, with an earlier check-in, 3-6 months for the Level 2 evaluation, the organization can determine how well the information was retained and applied. If the results were not what the organization expected, then the refresher training should be given in a different format and the data analyzed again. The evaluation after the refresher could ask questions, such as, what obstacles kept the learner from achieving the goals? For example, was the learner too busy; did the learner not understand the material the way it was presented; or did the learner not understand the importance of the concept presented and how to apply it? These types of questions would help the organization and the learner to achieve maximum effectiveness.

Question 3: Feels the Framework could be implemented as a strategy for a community-based learning system, which amplifies how learners learn to better reach the organizational goals. Evaluations can be questions specific to the material, or an iterative approach to make sure the learners are retaining and are confident to apply the material as they move through the lessons. The organization can apply the data to meet the learners as they are if needed.

Question 4: Feels benchmarks are good for assessing learning goal progress, especially if there is excess turnover. The data allows the organization to review past evaluations to determine trends to get everyone in the organization on the same page. For example, institutional knowledge can be lost when employees leave an organization, evaluations can ensure every learner, whether a seasoned or new employee, is gaining the knowledge needed, applying the same concepts to progress on their job, and allowing everyone to learn. Changing the material as goals are

adjusted is equally important to ensure the evaluations are flexible as new concepts are introduced and various learning styles accommodated.

6. Keywords: Agree, more than one evaluation, life busy, front and center, retrain, apply learning, easy to forget, refresher course, benchmark, individual, Level 2 evaluation, organization, determine, information, retained and applied, result, organization, different format, data reanalyzed, obstacles, achieving goals, learner, too busy, understand material, importance, concept, apply it, questions, organization, maximum effectiveness, foundation, community-based, amplifies, reach organizational goals, evaluation, questions, iterative approach, retaining, confident, apply the material, data, assessing goal, turnover, past evaluations, to determine trends, same page, institutional knowledge, ensure seasoned or new employee, gaining knowledge, needed, applying concepts, changing goals, adjust, important, ensure, flexible, new concepts, learning styles, determine need, create strategy, implement strategy, assess fulfillment
7. What went well: The 10<sup>th</sup> participant completed the program!
8. What could have gone better: At this point, I can't think of anything that could have gone better.

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1. **Participant code: P4**
  2. Scheduled or unscheduled observation: Unscheduled
  3. Researcher is non-participant observer: Yes
  4. Duration of observation: 30 minutes
  5. General Observation: Completed MMOC on January 8, 2024. Participant had the most to write

Question 1: Agree to more than one evaluation to determine the learning need, knowing the program is beneficial to the learner and incorporated to benefit the organization.

Question 2: Feels teams can share their evaluations to create a strategy and how the information acquired has been applied to organizational goals. Level 2 evaluation informs leadership on the time and resources to advance a topic. Educate leadership, a reflection of advocacy, the nature of service, and how to collaborate differently, if necessary. Empowers learners and teams. Can provide more competent learners and leaders.

Question 3: Feels Framework determines if the learner demonstrated a behavior change given time and resources. If goals are not achieved, time and resources are allotted for Level 3 evaluation to implement strategy for challenges, accomplishments, and recommendations. If sociocultural change is not stated in the organization's bylaws or mission, then no Framework would be effective. If sociocultural change is implied, then the Framework could be instrumental in impacting progress following founding documents and goals.

Question 4: Feels change does not happen overnight, the Framework could be used with other tools to facilitate learner, organizational growth, and assess fulfillment of the learning. The Framework provides an outline process (resources, timelines, training) for an organization to incorporate into its strategic mission and goals. If implemented, there should be an organizational understanding of a safe place for all learners to voice their opinions on issues and concerns. When recognized as a safe environment, learners can collaborate to express issues and identify strategies that align with the organizational goals and measure the effectiveness of goals.

6. Keywords: agree, beneficial, learner, applied to goals, time, resources, education leadership, reflection, advocacy, collaborate, empowers, teams, behavior change, determine challenges, accomplishments, recommendations, sociocultural change, impacting progress, other tools,

facilitate growth, process for resources, timelines, training, incorporate, strategic mission, goals, safe environment, collaborate, identify strategies, align organizational goals, measure effectiveness, determine need, create strategy, implement strategy, assess fulfillment

7. What went well: With the winter holidays and leave from the job, I commend the participant for being steadfast on completing the program.
8. What could have gone better: I could not read all of the response from the second and third questions.

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### **1. Participant code: P5**

2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Yes
4. Duration of observation: 30 minutes
5. General Observation: Completed MMOC on December 7, 2023.

Question 1: Disagree to complete additional evaluations. Agree if given the resource or meaning of the additional evaluations to determine the learning need. After reviewing the course, the learner would have been less annoyed if asked to complete additional evaluations after a training program. The organization should explain the reason why the additional evaluations before implementing the Framework.

Question 2: Feels the Level 1 and Level 2 evaluations provide learner engagement while providing organizational feedback and help to create a learning strategy. The Level 2 evaluation data can also help the organization with learning goals and to make changes where necessary.

Question 3: Feels the Framework provides accountability to sociocultural change as neither the individuals nor the organization can perform superficial make changes without an explanation to

implement the learning strategy. The learning strategy becomes a tangible goal with evidence-based results.

Question 4: The evaluations assess fulfillment of what the learner has learned from the training and manager behavior observations, which will benefit the organization return on investment.

6. Keywords: Disagree, Refuse, without explanation, agree, reason, learner engagement, organizational feedback, learning goals, changes, where necessary, accountability, sociocultural change, learning strategy, evidence-based results, learner, manager behavior, observations, return on investment, determine need, create strategy, implement strategy, assess fulfillment
7. What went well: Course Review - This was a very informative course. It was concise and structured well. I had never heard of the Kirkpatrick Model of evaluation. I believe that this would have helped hold participants accountable to apply the knowledge they acquired in professional development training. I have seen many DEI training sessions where staff are just present in the body and willfully ignore the learning objectives because there is no follow-up beyond attending a session. This evaluation technique can change the level of investment by participants and help organizations achieve real change if applied equitably.
8. What could have gone better: I should have had the course review and mobile link available for the participants.

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- 1. Participant code: P6**
2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Yes
4. Duration of observation: 20 minutes

5. General Observation: Completed MMOC on December 17, 2023.

Question 1: Disagree with more than one evaluation to determine the learning need, regardless of what was learned. Might not complete the first one knowing there are more.

Question 2: Feels formal evaluation can bring out learners' strengths and weaknesses, which can encourage growth and help to create a learning strategy. Sometimes it is good for the learner to see themselves through the manager's perception, especially with the Level 3 evaluation. Formal evaluations make learning easier to focus on the task than to think about what needs to be done.

Question 3. Feels change might only be temporary; however, because of the Framework over time, the learner can see what behaviors became part of the routine after implementing the learning strategy.

Question 4. Feels framework can expose what the learner is interested in learning and what type of learning style helps to retain the material and make the learning a habit. Retaining and making a habit is best for learners' and organizational goals and assessing the fulfillment of the learning strategy.

6. Keywords: disagree, lose motivation, no multiple evaluations, formal evaluation, learners, strengths, weaknesses, encourage growth, learner, managers perception, Level 3, easy, focus on task, needs, change, temporary, routine behaviors, expose interests, learning style, retain material, learning habit, retain habit, organization goals, determine need, create strategy, implement strategy, assess fulfillment

7. What went well: This participant was the first to use the mobile app. There was a lot a back and forth on what they could do in the app, for example filling out the evaluation was difficult, if not doable at all. The participant helped me to provide better mobile information to the other participants. Because most people carry their mobile phones everywhere they go,

instead of a personal computer, the mobile app at least gave the opportunity to view on the go.

8. What could have gone better: I should have tested all aspects of the mobile app on my phone. I had to pay an additional fee for the mobile access at the request of this participant.

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**1. Participant code: P7**

2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Yes
4. Duration of observation: 15 minutes
5. General Observation: Completed MOOC on December 18, 2023.

Question 1: Agree, more than one evaluation is appropriate, as these will expose different learning skills and determine the learning need.

Question 2: Feels a standard evaluation can be beneficial to both the individual and organization to create a learning strategy.

Question 3: Feels with different options and choices, the evaluations bring a sociocultural diversity for different strategies.

Question 4: Feels the style of teaching is changing; therefore, the observations, collection of data, and receipt of data has to change accordingly to assess the fulfillment of the learning strategy.

6. Keywords: Agree, multiple evaluations, appropriate, expose learning skills, standard evaluation, beneficial, learner, organization, options, choices, sociocultural, diversity, different strategies, teaching style changing, observation, collection of data, and receipt of data, determine need, create strategy, implement strategy, assess fulfillment

7. What went well: The participant completed the program. I was aware of the challenges the participants faced; however, they used alternate resources to upload the evaluation. African Americans are willing to learn from different methods and be helpful to other's success.
8. What could have gone better: Apparently the 1-2 hours for the program was too long. This was an approximate timeframe as I didn't know how fast a participant could read and digest the information. Knowing this information, I included more videos, and made one video a cliff notes version.

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**1. Participant code: P8**

2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Non-participant
4. Duration of observation: 15 minutes
5. General Observation: Completed MMOC on November 11, 2023. The participant began and completed the PDP on the same day and answered all the optional quizzes.

Question 1: Disagree. Evaluations are a waste of time because the person asking for the evaluation will not read it to determine the learning need.

Question 2: Feels evaluation could improve learning goals by determining gaps in communication and creating a strategy for the learning need.

Question 3: Feels the evaluation establishes what needs to be done to improve the learning strategy, which could help the organization grow and implement the strategy.

Question 4: Feels evaluation improves culture by attending to the needs of whom they are serving (the customer/stakeholder/employee). Evaluation could be used to improve the company goals and assess fulfillment of the learning strategy.



6. Keywords: Disagree, Waste of time, determine gaps, communication, improve, learning strategy, organization grow, improve culture, attending needs, company goals, determine need, create strategy, implement strategy, assess fulfillment
7. What went well: I cannot tell; however, I believe the participant completed the PDP without reading through modules 1-3. This is good, because they were able to provide constructive responses.
8. What could have gone better: Thinkific could tell me how much time a participant spent in the course.

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#### **1. Participant code: P9**

2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Yes
4. Duration of observation: 15 minutes
5. General Observation: Completed MOOC on December 29, 2023.

Question 1: Agree with one evaluation with a mix of multiple-choice and open-ended questions to determine the learning need.

Question 2: Feels the individual or organization's strategy for the evaluation would be to get a deeper understanding of learners' experience and needs when creating a learning strategy.

Question 3: Feels implementing the strategy would allow a deeper investigation or research for implementing the learning strategy versus the output or outcome.

Question 4: Feels framework could assess the fulfillment if the goals were achieved with inconsistent or consistent results. The results or data could provide evidence for future planning or goal setting.

6. Keywords: Agree, one evaluation, mix, multiple-choice, open-ended, questions, strategy for evaluation, deeper understanding, learner, experience, needs, investigation, research, output, outcome, access goals achieved, inconsistent or consistent results, data provide evidence, future planning, goal setting, determine need, create strategy, implement strategy, assess fulfillment
7. What went well: This participant had a determination to complete the survey, consent form, and program based on their verbal agreement and I would think to help out a fellow librarian.
8. What could have gone better: The participant completed the course within 30 minutes. Maybe the researcher didn't have to develop a full course. The Thinkific program was the result of a course assignment, and the researcher initially thought the course would be evaluated. Although the course structure is important, a professional development program could be a video, and there are no requirements on the length.

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### **1. Participant code: P10**

2. Scheduled or unscheduled observation: Unscheduled
3. Researcher is non-participant observer: Yes
4. Duration of observation: 20 minutes
5. General Observation: Completed MOOC on December 26, 2023. Completed survey, consent form, and program within one hour.

Question 1: Agree to complete several evaluations because the evaluation is a crucial component showing the effectiveness of the learner completing the goal and the organization for determining the learning goal. The feedback should provide refining of the program for learning and comprehensive styles, if necessary.

Question 2: Feels organizations should use the feedback to exact long-term strategies to drive better performance results and create a learning strategy.

Question 3: Feels sociocultural change is gauging the strengths and weakness of learning, and implementing the strategy is rarely accomplished. Why would instructors change if they do not know how the learners are using the course material? Otherwise, it is keeping with the same way of learning, which could mean no learning.

Question 4: Feels the Kirkpatrick Evaluation Framework could assess the fulfillment of future training culture, which can impact learning strategies.

6. Keywords: Agree, several evaluations, crucial component, effectiveness, completing goal, organization, feedback, long-term strategies, better performance results, sociocultural change, gauging, strengths, weakness, learners, use material, no learning, access future training culture, impact learning strategies, determine need, create strategy, implement strategy, assess fulfillment
7. What went well: This participant used the cliff notes version and I feel was still able to understand the benefits of the Kirkpatrick Evaluation Framework just as well as someone who read through the entire program. This example shows how learning styles are different and the need for several options of learning, instead of one style fits all. A professional development program can be a formal course or a five-minute video.
8. What could have gone better: Although the participant had to gain access to the program to upload the evaluation, I would have liked for the participant to at minimum view the modules to be able to provide a review of the program.



**Appendix R**

**Researcher's Focus Group Observation**

1. **Participant codes:** P1, P2, P4, P5, P6, and P9
2. Scheduled or unscheduled observation: Scheduled
3. Researcher is non-participant observer: No
4. Duration of observation: 65 minutes
5. General Observation: Completed focus group discussion on January 18, 2023. Productive, Engaging, brought new topics outside of Level 2 evaluation; I felt the participants experienced the panel as safe space

**Question 1.** None of the six participants had the lived experience of using the Kirkpatrick Evaluation Framework before this study.

**Question 2.** Four participants believe they have benefited from formal evaluations, as they always fill them out and give the best ratings or provide comments. Two participants reflected the formal evaluation was a check mark for attendance and were unsure of the evaluation's impact for the learners or the organization. However, one participant has benefited from her own informal evaluation of training. Another participant mentioned there has not been any evaluations for informal training, where someone makes sure you remember the material for informal training; however, these trainers could have learned the skills to become better.

**Question 3.** Although one participant did not have a direct example of working with management after training, she did provide that she requested Juneteenth as a holiday because they celebrated the US Independence on July 4. She considered this a type of impromptu evaluation, and she reflected on the experience of being heard as the organization accepted her response. Another participant reflected management put a push to attend DEIA (Diversity, Equity, Inclusion, and Accessibility) training for the employees to receive their certificates of completion. Yet, when it was time to put DEIA into practice because everyone should have been

on the same page, there was not a solid follow-up for implementation. In another instance, the participant was asked to provide a written report after an out-of-town conference training. Although the report generated a lot of positive feedback from the staff as her report included information about the city's community with pictures, she reflected this type of evaluation was busy work. Two participants agreed with busy work this assessment. Overall, two participants would like to see more meaningful management involvement with tangible outcomes, because management may not know how to implement changes. If the learner doesn't see outcomes, then they can present solutions to management. In contrast, one participant did see results from a pre-evaluation before the organization provided the professional development programs and a requirement for a written follow-up after training as the results were linked to grant reporting purposes. There was a survey sent to the staff on what type of professional development was needed. These results were used in the following years for future training.

**Question 4.** One participant did take it upon themselves to find out how training benefited other staff and how it could help future leaders. She also has presented developmental programs, from 5-50 minutes, to share her knowledge, not for herself but for the benefit of others. Another participant scheduled internal training for staff, with outside trainers, and asked an informal evaluation as "How did you like it?" There was one instance for one participant where an outside vendor presented the Steven Covey four-quadrant system to prioritize tasks. The managers found the staff enjoyed and applied this system and asked for the trainer to return and train new staff using the feedback from the first training. The trainer returned several times and presented virtually during the COVID-19 pandemic. This training was one where the evaluations helped to shape the training. One participant acknowledged there should be an intention for the training,

such as the four-quadrant system. Otherwise, the learner takes the training, and management does not follow up on what was learned.

**Question 5.** The participant who learned the four-quadrant system continues to use it and the other participants jokingly suggested she could present this program for her current staff.

**Question 6.** Three participants enjoy sharing their knowledge with colleagues. However, two participants mentioned the challenges of sharing the knowledge. One participant mentioned there might not be time to nurture and implement what was learned. Another participant mentioned that a formal evaluation is not so much a sociocultural change; however, depending on the role, it can be beneficial if there is time to read the feedback and make adjustments. If the presenter does not have the mindset to improve, then they may continue to do as they have been doing because making the time for recommended changes is not going to automatically happen. Three participants agreed evaluating evaluations can be a time-consuming process with reading the evaluations and implementing recommended changes. One participant worked on a job where there was not a dedicated staff for evaluations, which were sent to the 3<sup>rd</sup> party vendors. There was no check-in to ensure learners applied what was learned from the training. The performance review only documented that the training was taken.

**Question 7.** One participant informally empowers her new coworkers by encouraging them to take control of their areas to help guide the organization. This type of empowerment was a rebirth of an organization that structurally allowed some things to fall by the wayside. The new hires would ask questions or tell their challenges to a senior employee and provide recommendations to help their teams. She experienced this interaction as encouraging for the staff to do the research and empowered them for the next steps. She is also researching an



informal written infrastructure for working with other agencies and what should be considered with tangible outcomes.

**Question 8.** One participant reflected working as a librarian working with technology, she is always dealing with change. A formal evaluation allows the trainer to design something prior to the training when there are expected outcomes. Then if these outcomes are not met, there is feedback on what to change. The formal evaluation is best in this situation because it determines the learner is not wasting their time on development programs that do not benefit their jobs. She finds it more rewarding when she chooses her own professional development than what is assigned for the general organization. She has even suggested her personal training with colleagues and suggested why they might be interested in attending. Everyone might be on different listservs; what is a niche for one job might not be a niche for another librarian but that doesn't mean the other librarian would not be interested.

**Question 9.** One participant already touched on this question by explaining how she asked more questions to help future generations. This related to what was previously mentioned about a survey to determine the learning strategy and bring back information to coworkers. One participant mentioned her job sent a SurveyMonkey® questionnaire anonymously to find out what areas people wanted more training. Some worried this meant more work, but it helped to teach about the various roles. However, the department did not follow through. Another participant agreed, however, could see the colleagues getting upset, by asking how do you know what training is good for me? Which might lead to a joint assessment to determine what is best for the group. She found success in the team looking at the programs collectively and found a way to address the concerns. To determine the strategy, they created different ways to give the training with FAQs (Frequently Asked Questions), and not everyone was not technologically

adept. They had to move everyone forward to participate. There was a lot of partnering and peer work, to advance the entire group. This helped to reduce questions from the students.

**Question 10.** One participant knew they were required to complete a formal evaluation after training. She thought this creates more attentive learners because you have to be attentive and was more invested in the training. This changed her perspective and interaction with the training with an evaluation which asked her strategy to each other people.

**Question 11.** One participant would like to work with people to implement a learning strategy. Unless there is an urgent need to put something in place, the group might see the implementation as something that's needed but will not be vested in the activity. She likes to get people involved and help them recognize the challenge and the solutions, which is again a collaborative activity. One participant mentioned she learned that it could take five to seven years to move an idea. It takes one to three years to get people on the same page unless you are a visionary or early adopter. It then can take the next five years to help everyone move ahead. To help implement the challenge, she will write and verbalize it and ask others their opinions. Yet, when this is done, the originator does not own the process; it becomes a community document. One participant thought this previous comment was inspiring, and thought lessons learned are a type of evaluation. For example, on her job they had a new program and talked about what could have gone better and created a checklist for the next time to follow certain steps.

**Question 12.** Two participants agreed smiles on learners' faces and behavior changes during the training could assess the fulfillment of the learning strategy and the trainer should be passionate about the training.

**Question 13.** Two participants were never uncomfortable sharing what they thought about a program. What would make them uncomfortable would be if they knew the manager didn't want

to hear about, they were simply putting the learner on the spot, or their thoughts would create more work for them. In the last example, another participant agreed not to share, knowing it would create more work. One participant was uncomfortable when the training focused on racism. Although it was supposed to be a safe place in confidence, she reflected she had to be very careful about what she when was around white people as racism can be a touchy subject.

**Question 14.** Three participants experienced good sharing knowledge after taking training. One participant mentioned herself as a new manager when she took lessons learned back to her team and sent out a 360 anonymous survey after their annual reviews. She informed the team of the feedback and how she planned to make committed changes. The management training provided important information and she reflected a positive experience that she was not the only one providing feedback during annual reviews. It was a win-win. Another participant mentioned, especially when attending conferences, she met with other attendees to share because not everyone can attend all the workshops, particularly when the training resonated with them. This activity generates a lot of conversation and follow-up, and you get a little bit of understanding from those workshops not attended. The third participant would also share the goodies and the conference book distributed at conferences. Sharing the resources stimulated conversation and interest. One participants reflected when she could select the professional development, she enjoyed sharing what she learned, especially if she learned a new skill or method to do something. Even if they had to pay for the training, and were provided the time off, they had an internal motivation to share multiple experiences.

**Question 15.** With a look ahead, one participant already mentioned it can take five to seven years before changing the training culture. The Framework looks good in theory; however, the

follow-up can be hard. Making sure everyone understands the value is important. Training has a greater meaning when you want to be there and have a genuine interest.

**Question 16.** Six participants agreed the Framework could be a good model to use for evaluations, and one participant stated they feel evaluations are a crucial part of the training. One participant agreed with an all-in-one evaluation. One participant disagreed with using any type of evaluation with one participant mentioning the evaluation is a waste of time. Two participants who disagreed stated if they understood the need, then they would agree to complete the evaluation. When looking for challenges and implementing a new strategic plan, the Framework can be a good model. With a change in leadership, there can be a change in focus, and a mentorship to help them advance to the next level. The Framework combined with the organization's strategic plan can help with behavior changes. One participant agreed that reactions will bring challenges, which brings a reevaluation for the goals as a learning curve to behavioral change. Every couple of years there can be a reevaluation of specific goals to identify and advance areas of concern. One of the areas was communication, and with positive feedback from increased communications, there can be an alignment with the goals. One person mentioned life can get busy, and if the Level 2 evaluation is within 3-6 months after the training, there might not have been any work performed and the learner would need refresher training. One person mentioned the Level 1 evaluation is easy, compared to the Level 2 which is more intensive. One person mentioned the time to complete the Level 2 evaluation allows the learner to go back to the job and think about how they feel about the training.

**Ad hoc question:** From the previous response, was not necessarily using the Kirkpatrick evaluation? Answer: Yes, it did stem from some type of evaluations that were done.

**Question 16 continued:** With the Framework, the organization can quantify the training impact and gauge if the training is meeting the needs of the members or getting the intended outcomes.

**Question 17.** Thank you for the panel. Hearing the responses resonate and the theme is things move slowly and sometimes people are overburdened, even if we are inspired to take action. The questions helped the conversation flow, which encouraged responses to other questions.

**From researcher:** I initiated a mobile app version of the training and used one of the videos as a CliffsNotes version. One participant mentioned you need to switch up and change training when you go back and retrain. I did have to make those changes to make sure everyone was on board. Changes and modifications are necessary when learners are asking questions, or they have a need. One participant agreed that changes are good. Not everyone has a computer, and some people use their phones versus a computer screen because of the different format. Something to consider when designing online programs. One participant wanted an invitation to the graduation.

6. Key words: benefited from the evaluations, evaluation is a checkmark, unsure of the evaluation's impact, impromptu evaluation, not a solid follow-up for implementation, evaluation was busy work, like to see more meaningful management involvement, present solutions to management, see results from a pre-evaluation, future training, take it upon themselves, has presented developmental programs, informal evaluation as "How did you like it?", managers found the staff enjoyed, asked for the trainer to return, evaluations
7. What went well: I provided the questions in advance of the focus group discussion. This advance read allowed the participants to think about their lived experiences. During the discussion, everyone was listening and acknowledging the comments with continued

reflections. Again, I observed the participants experienced the discussion was a safe space, and their comments would not be recognized in the workplace or membership organization.

8. What could have gone better: I didn't realize how much the participants would have to offer and could have given individual interviews to give them more time for reflections; the element of time proved to be a very important factor in implementing the study's discussion and implementing a strategy. P4 especially had a lot to say, as she admitted to being cynical about implementing evaluation results. Her journal prompt and focus group discussion an overall willingness to trust the Kirkpatrick Evaluation Framework would make a sociocultural difference to implement a strategy or assess the fulfillment of the learners or organizational goals; however, she was reluctant to accept as true any evaluation benefits from management not implementing changes from previous formal evaluations. As a former trainer, she found the formal evaluation to be nothing more than an attendance check mark. She concurred with the concept of the Kirkpatrick Evaluation Framework's additional evaluations to assess the fulfillment of learners' and organizational goals only if the organization explained the reasoning before implementing the Framework. To make sure she had job satisfaction despite management involvement, Denise was persistent in implementing a strategy by sharing training information with her colleagues.