EVALUATION OF A MANAGEMENT TRAINING PROGRAM:
A Comparison of Participants' and Superiors'
Perceptions of Learning

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in the
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by

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ABSTRACT

The general purpose of the study was to provide an understanding of assessments of a training program by the participants and their supervisors. Specifically, the study served the following main objectives:

a) To investigate the stability of participants' ratings over time.

b) To compare participants' ratings with that of their supervisors.

Two null hypotheses were tested in the study. These were:

i) There is no difference between the participants' assessments of the perceived learning at the conclusion of the training program and their perceptions three months after the training event.

ii) There is no difference between the participants' assessments of the perceived learning from the training program and those of their supervisors, three months after the training event.

The sample consisted of thirty-five participants who attended the Basic Management course at the Co-operative College of Canada, Saskatoon in February and March 1981, and their supervisors. Three sets of questionnaires were developed and administered to the participants and their supervisors in the following manner. Immediately at the conclusion of the course, an end-of-the-course evaluation was administered to the participants to collect information on participants' perceptions about certain aspects of the course. Three months after the program, the participants and their supervisors were both mailed questionnaires to seek their perceptions of the course then, assuming that the participants had had some chance to implement the learning from the training program.
The data obtained from the participants' end-of-the-course and three months follow-up questionnaires provided information on the correlations between participants' ratings over a period of three months. The comparison of the data from participants' follow-up and supervisors questionnaires provided information on the differences in perceptions between the two groups.

The major findings of the study are as follows. It was found that at the 80% confidence level, the participants' perceptions of applicability are significantly correlated for four functions and their perceptions of competency correlated for only one function. However, the participants' ratings of competency are not correlated for the other three functions nor for any of the support functions. It was therefore decided to retain the null hypothesis of no difference between the participants' assessments of the perceived learning at the conclusion of the training program and their perceptions three months after the training event only for the applicability variable \((P < .20)\). The major conclusions from the findings are that the participants' ratings of applicability of the training program to his job situation are consistent over a period of three months and that the correlations between participants' ratings varied according to the type of variable rated.

The findings regarding the null hypothesis of no difference between the perceptions of supervisors and the participants, three months after the training event indicated that there were differences in perceptions between the participants and their supervisors. Therefore, the null
hypothesis of no difference in perceptions between participants and supervisors is rejected (P < .05). The major conclusions from these findings are that the participants' and supervisors' differed in their assessments of a training program and their assessments varied according to the type of variable they rated. There was no difference between the participants' and supervisors' ratings of applicability in regard to four functions but their ratings of competency differed in regard to merchandise and personnel functions.

Additional evaluative information was also obtained on several other areas of the training program which enriched the findings of this study. The several implications from the findings of this study for evaluating management training programs, in particular, the end-of-the-course evaluations, are also discussed. Suggestions have been made in the thesis for future research.
I wish to express my sincere thanks and appreciation to my advisor, Dr. Gwenna Moss, for her guidance and encouragement from the outset of the thesis until completion. I also wish to extend my thanks and appreciation to other members of my thesis committee, Dr. Edward Scissons, in particular for his help in designing the research proposal; Dr. R.A. Yakulic, for his patient explanation of statistical analysis of the data and Dr. Harold Sylvester who was on committee for my research proposal.

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CHAPTER 1
NATURE AND PURPOSE OF STUDY

1.1 Background to the Study

Training and development programs in industry have become a big business in their own right. The vast extent of human resources as well as money and other resources expended on training requires one to ask at least two questions: Are these training programs really effective? How does one assess their effectiveness? The answers to these questions are complex and elusive. They can be answered and understood only within the total perspective of evaluation.

There is evidence of confusion and disagreement in the literature over the definition of "evaluation" as it relates to training. A variety of words are used to define evaluation, such as "appraise", "assess", "measure", "pay-off", "control" and "validate". The problem arises when these words are used as synonyms, which they may be only in special cases. There are many definitions of the evaluation of management training programs. These definitions vary according to the background of the author (e.g. education versus psychology) and according to what the author deems to be the main objective of that program.

Mahler (1953), in an early definition, saw the evaluation of management training programs as, "an attempt to arrive at a correct judgement of the value or the worth of such a program; this judgement may be either in monetary or in non-monetary terms" (p. 116).
Bilyea (1980, p. 83), in a recent definition, sees management training evaluation as a process that measures the current performance of the managers and guides it towards some predetermined goal. For the purpose of this study, it is deemed that to evaluate a management training program is to determine the worth of that program, relative to the objectives it sets out to reach.

Trainers as well as writers in the field acknowledge the merits of evaluating training programs. The advantage of evaluation is that it provides feedback to the program planners regarding the efficiency, effectiveness and utility of the program. Sullivan (1970) presented an analysis of the writing of twenty-three authoritative contributors to the training literature showing why they regard evaluation of management training as important. It showed that, over the period 1950 to 1970, one constant reason for evaluation was to check if training money is well spent. A further major reason was to enhance the survival of training function. However, in Sullivan's survey of American industries, the most frequently cited purpose for evaluating training programs was to find out how training contributed to profit, growth and survival of the firm (1970). Clegg (1978) replicated Sullivan's study and found that the most frequently cited objective for evaluation was to determine if there was any "pay-off" from the training.

Despite the seeming importance of evaluating management training programs, there is, in fact, little formal evaluation being conducted.
The current picture is best described by McGhee and Thayer's (1961) analogy to Mark Twain's comment about the weather: everybody talks about it but nobody does anything about it. There are many reasons for fewer evaluations. Besides the conceptual and theoretical problems, training evaluation is affected by factors that arise from the training environment itself. Evaluation of training programs is generally seen as a potentially sensitive activity and could easily become a political issue (Angrist, 1975; Weiss, 1970). Moreover, some past attempts have been over-ambitious and have failed (Hasseling, 1966). In many instances, unclear training objectives hamper the evaluation activity (Clegg, 1978). According to Hogarth (1978), because of the plethora of management research projects, few researchers now feel inclined to commit themselves to that field.

An important reason for not evaluating training programs seems to be the lack of knowledge of proper methodology needed to carry out evaluation (Clegg, 1980; Schwind, 1975). "Proper methodology" is equated to scientific research methodology in training literature. Scientific control and precision in measurements are likely to be unattainable in the reality of an organizational environment. There is the problem of finding a control group within the organization. Furthermore, the trainers in the field lack the time, expertise, financial and other resources to execute a rigorous scientific evaluation. Watson (1979) points out that:

To accept training as having only so much value as can be scientifically measured in quantitative
terms is naive because it says that dollars and cents are all that matter, and that one should only act when he or she enjoys complete certainty. This level of certainty simply does not exist in our complex world. (p. 264)

Studies have also shown that increased complexity of the experimental design does not necessarily seem to correlate with the conclusiveness of the results. For example, Bunker and Cohen (1977) employed a well conceived and carefully constructed Solomon-Four-Group design. Despite this elaborate design, pre-test contaminants were still determined to be present. The subjects' initial numerical aptitudes affected their subsequent test results, and the effectiveness of the training was determined to be inconclusive. The authors indicated that additional expanded research was considered necessary for proper evaluation.

Nienstadt (1979) concluded, after doing a literature survey of the various published research efforts, that:

The nature of the experimental design greatly affects the results derived from these training evaluation efforts. Even though the reported number of field studies is somewhat sparse, the inconsistency in methodology and diversity of conclusions becomes clearly evident. (p. 28)

Given the constraints of using experimental designs, the types of evaluations that can be conducted in the reality of an organization's environment are limited. This is the general problem of evaluating management training programs. The challenge then remains not only to develop new evaluation methodology for management training programs, but also to improve upon the existing evaluation methodology. This challenge is the very basis of this study.
1.2 The Problem

The considerable controversy over the evaluation of training stems basically from the problem of choosing the appropriate criteria. The effectiveness of evaluation is determined by the type of criteria used for accomplishing the purposes of evaluation. A criterion is a standard of comparison of objects or an idea against which measurement or judgement can be made.

As Nixon (1973) points out, it is very difficult to find good criteria— that is, a criterion that generates a great degree of confidence and agreement in evaluating supervisory training. Evaluation of training remains an exceedingly difficult matter, mostly because of the lack of meaningful criteria for judging the "success" or "effectiveness" of training.

Smith (1976) distinguishes between hard criteria and soft criteria. Hard criteria are those that are generally obtained from organizational records. For example, they are the records of quantity, quality of output, absence, tardiness, overtime and reprimands. Soft criteria, on the other hand, are the ratings from superiors, peers, subordinates and self.

Although the hard criteria are an ideal choice in evaluating training, there are numerous limitations to their use. Saucer (1980) points out that hard criteria might be "contaminated" (affected by factors beyond the worker's control) or they may be "deficient" (not representative of the worker's entire job). For instance, it is very difficult to attribute the results from a training program directly to
the training event. That is, many other intervening variables in a company may be responsible for reduction in costs and employee turnover apart from the particular training event. There are, however, certain kinds of training programs such as safety programs which are easier to evaluate in terms of results. Because of the difficulty of controlling extraneous variables while using hard criteria in evaluating training, their use is very limited in practice.

On the other hand, soft criteria are a popular evaluation format in business and industry. The most common soft criteria used in evaluating training programs are ratings by participants. These are followed closely by ratings of superiors and subordinates. Catalanello and Kirkpatrick (1968), in their survey of American industries, found that the majority of organizations tended to measure trainees' reactions. Sullivan (1970) made the following conclusions based on his survey of American industrial firms that offer formal in-house management training programs:

Ninety-four percent of the firms offering such courses attempt to evaluate them, but the evaluation methods used of many possible, and those which are employed are usually the more subjective type such as basing evaluation on passing comments, student participation in class, end of course student reaction, instructor reaction and post-course surveys of trainers. (pp. 199-200)

Clegg (1978), who replicated Sullivan's study (1970), found no significant change in evaluation criteria used since Sullivan's survey. Clegg indicated that the most frequently cited criteria were changes in performance, reaction of the participants', changes in knowledge, skills or attitudes. Only about eight percent of the firms surveyed
indicated they conducted evaluation that attributes changes in company's operating results to training.

The measurement of participant's perceptions of training is a convenient technique used by trainers to get quick feedback about the program. It is convenient in terms of the amount of time, financial expense, human and material resources required for end-of-the-course evaluations. Some evaluation literature on formal education (formal schooling at an institution of learning) considers the students' (participants') ratings as being reasonably reliable, valid and consistent in measuring the quality of courses and instruction (Costin, Greenough, & Menges, 1971; Stumpf, Freedman, & Aguanno, 1979). In training evaluation, there is, however, considerable controversy about using participants' ratings as evaluative criteria (Andrews, 1966; Odiorne, 1961; Suessmuth, 1975).

On the other hand, ratings by superior have traditionally enjoyed a great deal of importance in appraising management performance (Saucer, 1980). Management jobs are often multi-dimensional and hard to define. As such, performance in them is difficult to quantify and make objective. One can, therefore, assume that the superior has the best overview of the situation and knows best how the management job behaviour contributes to the overall goal of the organization. One may perhaps also argue that the hierarchy of formal authority which exists in most organizations legitimates the right of the superior to make decisions concerning his or her subordinates.

Moreover, according to Cummings (1973), there is evidence that the immediate supervisor's appraisal is highly related to the average
evaluations across appraisals and to objective measures of performance. Cummings further maintains that an appraisal by the immediate supervisor may function adequately in the absence of other assessments (1973, p. 104). However, because of the problem of rater bias, no single rater on his own can be considered an effective evaluator.

Many studies provide convincing evidence that observers differ in what they see and report. A substantial portion of observational variance is apparently due to the differing expectations and perceptions of observers. For example, peers, superiors and subordinates differ in their ratings of employees. Centra (1973) compared college teacher's self-ratings with ratings given by students. Teachers' self-ratings had only modest relationship with the ratings given by the students, and there was a tendency for teachers as a group to give themselves better ratings than their students. Blackburn and Clark (1975) did a study of rating of faculty members by administrators, colleagues, students and faculty members themselves on two performance measures: teaching effectiveness and overall contribution to the college. They concluded that there was considerable variation in the factors that entered into performance judgements as they were made by colleagues, students, administrators and self. Brief, Aldag and VanSell (1977) concluded a study to explain the degree of congruence between self and superior evaluations and found little agreement between the two raters.

The major problems in evaluating management training programs outlined in the discussion so far can be summed up as follows: The types of evaluations that can be conducted in the reality of
organizational environment are limited. The most common forms of evaluation in business and industry are ratings by participants' (employees), superiors and subordinates. However, there is evidence from many studies that there is an observational variance among raters and that rater bias is a very serious problem. Some attempts have been made in the field of performance appraisal and formal education to understand the similarities and differences amongst various raters. Unfortunately, the literature on training evaluation does not give emphasis to this problem.

It is the contention of this thesis that if the learning from the training program is to be effectively evaluated, it is essential to understand the participants' perceptions of learning. As pointed out earlier, the ratings by participants at the conclusion of a program are a very popular evaluative format. It is, however, important to understand whether the participants' ratings of the perceived learning from a course are the same several months later as they were at the end of the training program. In other words, are their ratings correlated over time.

Superior ratings are another popular evaluative criteria in management training programs. Furthermore, since the ultimate aim of any management training program is to transfer the training to the job situation, it is important to consider superiors' as well as participants' perceptions of this learning as it relates to the job situation.

The problem then, can be specified as determining whether participants' perceptions of learning from a management training program are
correlated over time, and whether there are differences between participants' perceptions of learning and the perceptions of their superiors.

1.3 **The Purpose of the Study**

The general purpose of this study is to provide an understanding of assessments of a training program by the participants' and their supervisors.

Specifically, the study serves the following purposes:

a) to investigate the correlations between participants' ratings over time.

b) to compare participants' ratings with that of their superiors.

1.4 **Research Question**

Do participants' ratings of the perceived learning of a management training program differ from the ratings of their supervisors three months after the training event and are there correlations between participants' ratings over time?

1.5 **Hypotheses**

The following null hypotheses will be tested in the study:

(i) There is no difference between the participants' assessments of the perceived learning at the conclusion of the training program and their perceptions three months after the training event.

(ii) There is no difference between the participants' assessments of the perceived learning from the training program and those of their supervisors, three months after the training event.
1.6 Definitions of Terms

**Management training program**: those training programs that attempt to improve current or future managerial performance on the job by providing largely cognitive or theoretical learning environment.

In this study, the specific management training program studied is the Basic Management Course offered by the Co-operative College of Canada, Saskatoon. The main objective of the course is to introduce the basic concepts of management and apply them to the management of credit, merchandising, personnel and finance.

**Participants' supervisors**: the participants' immediate supervisor or boss in the hierarchy of his or her organization.

**Perceived learning**: is defined in terms of how one "feels" or "thinks" about certain specific job skills taught in the Basic Management course.

**Participants**: the persons who attended the Basic Management course offered by the Co-operative College of Canada, Saskatoon in February and March, 1981.

**Participants' ratings**: it generally refers to the assessments of a course or a training program by course participants or trainees.

In this study, it refers to assessments by participants about perceived learning from the course at the conclusion of the course and three months after the course.

**Student ratings**: it generally refers to assessments of courses or instructors by students attending regular academic courses in schools, colleges and universities.
Self-ratings: It generally refers to assessments by individuals about their performance in a variety of situations such as in the classroom situation or on the job.

1.7 Limitations of the Study

The conclusions of this study are limited to the Basic Management Course offered by the Co-operative College of Canada, Saskatoon. Further studies using other management training programs and larger samples are needed for the generalizations of the conclusions.

The assessment of perceived learning three months after the training period places certain limitations, since participants are expected to continue applying their learning from the training program to the work situation for a much longer period. However, three months after the training is considered a reasonable measuring point since by then the participants would have had some opportunity to apply some of their skills to job situations. Moreover, the longer the period after training, the more the threat of history and maturation.

1.8 Need for the Study

This study will make substantial contribution to the literature on evaluation of management training programs. In particular, the study will provide important information on the course participants' correlations of ratings over time and on the differences in perceptions of learning from the training program between participants and their supervisors.
One obvious contribution of this study is to the Co-operative College of Canada, Saskatoon. The program, Basic Management Course has never been formally evaluated in a follow-up study. It is hoped that this study will provide the instructors as well as the program planners of the course with relevant information.

1.9 Assumptions Underlying the Study

The following assumptions were made in the study:

(1) The learning from the training program would have some effect on the job performance of the participant.

(2) Three months after the training event, the participants would have had some opportunity to implement the learning from the training program to their job situation.

(3) The supervisors were aware of the Basic Management course objectives.

(4) The supervisors had plenty of opportunity to observe participants' job performance as it related to this study.

1.10 Organization of the Remainder of the Thesis

The review of the related literature and research is included in Chapter 2. Details of the research methodology are outlined in Chapter 3, while the analysis of data is in Chapter 4. The last chapter, Chapter 5, includes summary of findings, conclusions and recommendations for future research.
CHAPTER 2

REVIEW OF THE RELATED LITERATURE AND RESEARCH

2.1 Introduction

The literature search encompassed a variety of sources and included several disciplines such as psychology, education and business management.

Manual searches through indexes of the relevant journals, books and dissertation abstracts were carried out at the libraries at the University of Saskatchewan and at Northeastern University in Boston, Massachusetts; and at public libraries in Saskatoon, Saskatchewan and Boston, Massachusetts. Computerized searches were conducted using the following data bases:

Library of Congress (LIBCON)
National Library of Canada
Education Resources Information Centre (ERIC)
Social Sciences Citation Index
The Comprehensive Dissertation Index
Management Contents
ABI/INFORM
Co-operative Documentation System (CODOC)

It was difficult to categorize the material without repetitions and overlap as there are many interrelationships in the material covered. However, it was decided to organize the review in the two main categories: general information on evaluating training programs
and specific information on different raters.

2.2 The Concept of Evaluation

Evaluation is a natural process. It is an integral part of one's everyday decision-making process. As far as program evaluation is concerned, even the most superficial glimpse of the literature reveals that evaluation means different things to different people. One of the important reasons for this is found in the developmental history of the concept of evaluation.

An early thrust in the development of evaluation theory occurred in the 1920's and 1930's. At this time, the evaluation specialists were generally members of the measurement subdivision of psychology. This resulted in evaluation being closely associated with measurement. The science of evaluation was viewed as the science of instrument development and interpretation. The role of judgement in evaluation was obscured (Stufflebeam, Foley, Gephart, Guba, Hammond, Meriman, Provus, 1971, pp. 9-11; Tyler, 1969, p. 397).

Tyler's work in the early 1930's represented a turning point in the concept of evaluation. He formulated a systematic methodology for evaluating the outcomes of instruction. According to Tyler, evaluation is the process of determining the extent to which the educational objectives are actually attained (Tyler, 1950, p. 105).

Another important development in the concept of evaluation was the controversy over the relationship between evaluation and research during the 1950's and 1960's. By the late 1960's, it was generally
recognized that available theories of evaluation were inadequate to meet the demands made of them. These difficulties are best summarized by the Phi Delta Kappa Study Committee as the problems of: definition, decision-making, values, criteria, and the research model (Stufflebeam et al., 1971, p. 314).

The evaluation specialists responded to this challenge by producing better models and stronger theoretical bases. Michael Scriven's article, "The Methodology of Evaluation" is now considered as one of the classic first steps in this process (1967). He describes evaluation as a methodological activity consisting of "the gathering and combining of performance data with a weighted set of goal scales to yield comparative or numerical ratings" (Scriven, 1967, pp. 39-43). One of the important contributions that Scriven made to the concept of evaluation was to differentiate between formative and summative evaluation. Formative evaluation is the process of making improvements in a program while it is in progress. Summative evaluation on the other hand, is a process of determining the effectiveness of a program once it is completed.

Further contributions to the concept of evaluation were made by several writers in the seventies. The Phi Delta Kappa Study Committee definition of evaluation emphasizes the decision-making aspects. It sees evaluation "as the process of delineating, obtaining and providing relevant information for judging decision alternatives" (Stufflebeam et al., 1971, p. 40). Worthen and Sanders (1973) see evaluation as simply determining the worth of a program, product, procedures or objects. Steele (1973) suggests that the following seven key ideas are emerging
in contemporary evaluation literature:

(1) Program evaluation is a process rather than a procedure. It is generic rather than specific.
(2) It is more than examining the attainment of objectives.
(3) It is more than just evaluating the results of a program.
(4) It is more than instructional evaluation.
(5) It is different from evaluation research and program research.
(6) It is a management tool for providing feedback of information to program administrators.
(7) It is people oriented.

To sum up, there exists today, many divergent concepts of evaluation. As Weiss (1972) explains, these "differences arise largely from differing assumptions about why evaluation is undertaken and what it serves" (p. 3). Steele (1973) has further elaborated this point; "some explore evaluation from the standpoint of its purpose, some from the standpoint of need, and some from the interactive elements involved" (p. 20). Although there has been a great deal of progress made in the field of evaluation, considerable work still remains to be done. The discussion on the concept of evaluation is crucial to understanding the current state of evaluation of training programs in industry.

2.3 Evaluation of Training Programs

Over the years, management training programs have become more varied in function and they operate in a technologically sophisticated environment. This makes it essential to have a feedback system that
supplies information pertaining to the planning of appropriate and efficient training programs. Evaluation of a training program is one of the important feedback systems which provides information on the effectiveness of the program. It answers such questions as: are the program objectives achieved? What are the results? Did the clientele like the program? Was the method used effective? One of the important reasons for evaluating training programs to-day is that the marketplace has become extremely competitive. Training departments have to prove their worth in order to survive.

Evaluation of management training programs is a recent phenomena. Management training programs were becoming a vogue during World War II, but evaluation was ignored (Rendall, 1960). It was in the late fifties and early sixties that evaluation of management training programs began to get any serious attention. By the late sixties and early seventies, the concern for evaluation had reached its peak. In fact, the number of articles on training evaluation published during that period justified a separate indexing category for them in the Labour Personnel Index (a bibliography of personnel articles appearing in numerous publications).

As pointed out in Chapter 1, there are many different concepts of evaluation as it relates to training programs. To evaluate training is to assess the value of the training programs and to discover the nature of the resultant change. Evaluating the effect of training on the job situations of the participants is a special characteristic of training evaluation. In training, all efforts are directed at changing
trainees' attitudes, levels of knowledge and their skills on the assumption that these changes would be transferred to their professional environment.

The evaluation of management training has a special characteristic that distinguishes it from that of technical training. As Watson (1979, p. 203) has pointed out, management training is different because it involves the development of conceptual, judgemental and problem-solving skills as well as the ability to work and supervise others. Thus, the evaluation of management training is concerned with the participants as well as the persons they (participants) supervise on the job.

There are a number of problems related to the evaluation of management training programs. Some of these are embedded in the very concept of evaluation. Others relate to difficulties which arise from the training environment itself. For instance, a poorly organized supervisory training program with ambiguous objectives is difficult to evaluate. Moreover, certain types of training programs do not give direction for carrying out evaluation. For example, supervisory training for safety work suggests that the evaluative criteria could be the accident rate, the seriousness of accidents, and the number of working days lost. However, in the case of evaluating human relations training for supervisors, there are no clear evaluative criteria.

Another problem related to the evaluation of management training programs is that of the Hawthorne effect. Hawthorne effect theory suggests that the employees perform more efficiently simply because
they are given special attention. Related to this problem is the issue of distinguishing between the effects resulting from the explicit content of training and those resulting from the symbolic content of training (Meignier, 1960). For example, it is difficult to evaluate whether the better performance of the trainee is a direct result of the training or of the trainer's amicable personality or a result of the trainee's maturation.

The politics of evaluation is a very real problem affecting the evaluation of management training programs. The intervention of power in the process of day to day business is universal to all organized human activity, and evaluation is no exception. There is often, in the business world, a polarization of views within the Board or amongst the executives on the type of training required. In such cases, evaluation becomes a highly sensitive activity - because the ultimate evaluation is not of the data itself, but of the meaning attached to the data. In organizational politics, the distribution of power and influence has a vital impact on the nature of evaluation.

Politics are also manifested in another way in evaluating management training programs. Various personnel within the hierarchy of an organization expect evaluation to answer different kinds of questions. For example, the top administrators or policy-makers may need decisive information on such far-reaching questions as the continuity of a program. On the other hand, the program planner is interested in day-to-day problems of running an efficient program. The problem, then, for the evaluator is to remain cognizant of the
interests of all interested groups and to produce an effective evaluation of a program.

Other problems in evaluating management training programs are the normative methodological problems of evaluation. Such critical questions as time, resources, kinds of criteria to use and the selection of instruments require specific strategies in evaluating training programs. However, as pointed out in Chapter 1, the selection of criteria remains an exceedingly difficult problem in evaluating management training programs. In training evaluation, the most popular criteria used are the measurement of participants', superiors' and subordinates' perceptions. However, the perceptions of any one of the above groups could be influenced by their personal biases, preoccupations and real or perceived changes in the organization. The problem of rating criteria in general and the ratings of participants and the supervisors is reviewed in the next few pages.

2.4 Problems Related to Rater Evaluations

The problems, errors and dilemmas inherent in ratings have been given considerable attention in performance appraisal literature. Klimoski and London (1974) report that suggestions have been made in the literature for content changes, specific formats, and training. It is also apparent that numerous writers in the field appear to concentrate on the rater himself or on "the observer" as he is sometimes called. One outstanding conclusion of the writings on the rater is that the ideal rater, who observes and evaluates what is important
and reports his judgement without bias or appreciable error, does not exist. Barrett (1966) has very aptly put it that if the ideal rater does exist, "we don't know how to separate him from his less effective colleagues" (p. 7).

One of the most common problems related to rater evaluations is rater bias. According to Holzback (1978), "Rater bias, in its various forms and manifestations, is perhaps the most serious common drawback to performance ratings" (p. 579). Leniency error and halo effects are some of the common rating biases.

**Leniency Error**

Although leniency error is one of the most widely recognized of the rating biases, there is some confusion in the literature about its definition. Sharon and Bartlett (1969) suggest that there are two ambiguities in the definition of leniency error that should be cleared. First, to call leniency an "error" is unjustified unless an external criterion is proposed. There is no way to determine whether a given rating is too high or too low unless there is a standard to which it can be compared. Second, the definition should make clear that leniency can be constant across situations as well as raters. A stable tendency within a rater to differ in his ratings from others means that there are some individuals who could be called hard raters and some who could be called easy raters. A stable tendency towards leniency in certain situations more than in others suggests the need to distinguish between situations.
Leniency error, then, can be said to occur when ratings from different sources on the same ratee group are significantly different (Sharon & Bartlett, 1969). The evidence suggests that self-ratings are more lenient than either superior or peer ratings (Kilimoski & London, 1974; Parker, Taylor, Barrett & Martens, 1959; Prien & Liske, 1962; Thornton, 1968). On the other hand, superior and peer ratings do not differ appreciably (Kilimoski & London, 1974).

**Halo Effects**

Halo, as a type of rater bias, occurs when a rater does not differentiate between distinct items or dimensions in his evaluation of the ratee, but evaluates the ratee according to a global or overall judgement. Some studies have found that systematic as well as rater group specific halo effects accounted for the most significant portion of the common variance on performance ratings (Kilimoski & London, 1974; Prien & Liske, 1972).

When the level of the halo effect is measured by the magnitude of the intercorrelation among items obtained from each rating source, ratings by superiors consistently exhibit greater halo effects than self-ratings (Heneman, 1974; Kilimoski & London, 1974; Lawler, 1967; Parker et. al., 1959; Prien & Liske, 1962). Peer ratings tend to show comparable halo effects to superior ratings (Lawler, 1967), although Kilimoski and London (1974) found that the halo effect for peer ratings was greater than for superior ratings.

Halo error is perhaps the most serious form of rater bias in that it is prevalent in most subjective evaluations, detracts from the
discriminant validity of a set of ratings, and affects the dimensionality of the items being rated.

According to Holzback (1978), raters, in general, appear to be incapable of accurately evaluating performance on a variety of distinct dimensions independently of their global impressions. But if raters were asked to express their global or overall evaluation of the individual being rated, this component of the ratings on specific performance items could be removed through statistical control.

In rater evaluation, human judgement is the crucial factor. Hence, the conditions which provide the most accurate and useful ratings should be identified. According to Mingolelli (1979), an effective rating program should ensure that raters firstly, have an opportunity to observe the performance they rate; secondly, have ability to make sound judgments; and lastly, use appropriate standards against which to rate performance (p. 98). He further identifies several factors which affect the accuracy of the rater. These are outlined as follows:

A. Observation of performance by rater

In any rating procedure, observation is the first step. The rater has to collect information by using a variety of methods. These could be direct observation, study of records and interviews with the ratee himself, the ratee's superiors and his subordinates. Sufficient opportunity to observe pertinent information and behaviour is required in order to adequately perform a rating.

The optimum amount of time required to effectively evaluate another's performance depends not only on the complexity of the job,
but also on how closely the rater and the ratee work together. According to Barrett (1966), for less complex jobs where there is a close contact between the supervisor and the subordinate, satisfactory ratings may be possible within three months. However, on more complex jobs where employees have more freedom for independent action and where the impact of their decisions may not be felt for some time, longer periods (as much as a year) may be necessary.

One can question the accuracy of ratings made by a rater who has worked very closely with the ratee for a long time. Friendship or mutual antipathy can build over the years to a point where the rater can no longer make an accurate judgement. On the other hand, more time is required to rate the performance of new employees. A new employee should be given an opportunity to stabilize his performance while getting used to the job and his new supervisor. In summation, a rater should have some familiarity with the ratee's performance in order to effectively evaluate it.

B. Ability of rater to make sound judgements

Once the observations are completed, the rater must evaluate what he has seen and record his impressions. This requires that the rater should have the skill to draw conclusions from the large amount of observation. He should have a thorough knowledge of what is required of the job, the standards of satisfactory performance and the purpose of the rating.

It would then be assumed that an ideal rater would have special qualities which would enable him to make sound judgements. However,
there is no evidence in the research that factors such as intelligence, personality and better management skills have any direct relationship to the ability to make accurate ratings. Despite this, common sense seems to indicate that in general, bright and competent people are good raters.

C. Personal performance standards used by raters

One of the important factors that affects the accuracy of the rater is his own value system. The rater has to make decisions as to whether what he has observed is good or poor, satisfactory or unsatisfactory. It is at this point that the rater's own personality, experience and personal values are reflected in the ratings. There is evidence in the literature that lack of inter-rater agreement is often due to differences in the standards of the raters. Data in a study by Kilimonski and London (1974) reaffirmed the premise that inter-rater disagreement may reflect systematic bias, as well as meaningful differences, in the ways in which judgements are made.

D. Position of rater relative to person rated

Finally, the occupational position of the rater relative to the person being rated determines, in part, the extent and nature of his opportunity to observe, the quality of his judgement and the appropriateness of his point of view (Barrett, 1966; Kilimoski & London, 1974; Blackburn & Clark, 1975; Mingolelli, 1979). Those individuals generally in a position to make ratings are:

i) Self: The person who rates himself.

ii) Peers: Those who are in approximately the same occupational
hierarchy as the person rated.

iii) Subordinates: Those personnel supervised by the person rated.

iv) Supervisors: Those personnel occupying higher positions in an occupational hierarchy than the person rated.

In summation, rater bias is a very real problem in evaluation.

Awareness of various problems related to individual raters is crucial for effective evaluation.

2.5 Ratings by Supervisors

Ratings by supervisors have traditionally been favoured as the employee appraisal criteria (Mingolelli, 1979; Prien & Liske, 1962; Saucer, 1980). Supervisors are presumed to have a combined knowledge and working experience of the overall goals of the organization, and are expected to have ample opportunity to observe the activities of an employee. Balloun, Norton and Konstantinovich (1980) contend that supervisory ratings serve the purpose of allowing a supervisor to impact on the employee's some opportunities for promotion. They further add that, "Despite their psychometric and interpersonal disadvantages, they are useful and sometimes essential, for personnel management in large formal organizations" (p. 384).

The value of supervisor ratings seems apparent, but there are some limitations to this approach which need to be addressed. A sound rating process requires that a supervisor should observe the employee's performance at least periodically. However, in reality, it is difficult for a supervisor to know precisely just what each of
twenty to thirty or more subordinates are doing. Furthermore, the rating process becomes more difficult as horizontal differentiation increases; a job becomes more specialized and the results of the employees' efforts become less comparable across individuals. This horizontal differentiation is compounded by vertical differentiation, a situation where the supervisor of an employee knows less about the employee's job than does the incumbent.

The validity of supervisory ratings is then frequently affected by their overall impressions and global judgements of the employee's job. The decision-making process of ratings is often influenced by a few isolated incidents which may seem vaguely related to organizational goals but which do not give a fair assessment of an individual's true performance. In many cases, the validity of ratings is reduced by supervisor's resistance to making the rating. It is hard to pass judgement on an employee, especially if that judgement will become part of an official record. Mingolelli (1979) points out that, "This awareness of what could follow an employee's evaluation can affect the final judgement in errors of social pressure or conscious bias" (p. 105). Social pressure is usually reflected in the error of leniency or the error of central tendency.

Judgements by supervisors are not always objective since their judgement is influenced by the probable effects their opinion will have on the ratee. This results in supervisors inflating their evaluations when they are to be discussed with the person rated. Moreover, in a close and continuing work relationship, unbiased and
impersonal evaluations of employees by their supervisors are rather
difficult to obtain (Mingolelli, 1979).

Ratings are also affected by a supervisor's attitude toward the
person he is observing and the situation in which the person is
performing. If the supervisor has preconceived, generalized impressions
of the employee, the "halo effect" is introduced. On the other hand,
if the supervisor's evaluation is based on one specific situation, then
the ratings are not valid. For instance, a dramatic but isolated event
may cause a supervisor to ignore other important but significant events
in the performance of his subordinate.

Knowlton and Mitchell (1980) found that, given exactly the same
level of actual performance, subordinates were evaluated differently
depending on whether their supervisor attributed their performance
level to effort or ability. They found that an attribution to effort
leads to higher evaluations when performance is high and to lower
evaluations when performance is low than does an attribution to ability.

In the field of academic education, administration personnel have
been traditionally considered to be a source of information regarding
teaching effectiveness. The major responsibility for teacher evalua-
tion has rested with those individuals responsible for making decisions
regarding teacher tenure, promotions and salary increases. However,
there is widespread argument over whether or not administrators and
supervisors can effectively rate teaching performance. Bouvette-
Isaacson (1979) points out that evaluation of teaching effectiveness
is most often based upon casual, informal classroom observation of
teaching performance which accounts for the rating differences found among administrators (p. 10). Other important reasons for the lack of agreement among ratings of teaching effectiveness are that administrators have differing concepts of teaching effectiveness. Moreover, administrators have varying amounts of training in the handling of data and have different levels of professional sophistication in the use of evaluation technique.

There is, however, a great deal of support for administrative rating of teaching effectiveness. According to Bouvette-Isaacson (1979), "Most educators and researchers agree that administrative rating of teaching effectiveness does serve a purpose in teacher evaluation, particularly as a source of evaluative data for administrative decision making" (p. 11). Nevertheless, as teacher militancy causes administrative personnel to assume a less important role in the determination of teacher tenure, salary increases and promotions, administrative rating of teaching effectiveness will become correspondingly less important.

The trend is similar in the business environment. There is more emphasis on employee participation in performance appraisals. Research has demonstrated that ratings by supervisors are generally the most useful when compared to ratings from individuals in other positions, in particular, the ratee himself. While supervisors continue to be the most favoured raters, limitations to their ability to accurately rate should not be overlooked.
2.6 Ratings by Participants

Research on training evaluation demonstrates that a popular method of evaluation is the measurement of participants', superiors' and subordinates' perceptions. These measures may be taken before, during and at the end of the program and, occasionally, a few months after the training event. The convenience of administering evaluations by the individuals who participate in a course or a training program, have made it a favoured form of rating (Catalanello and Kirkpatrick, 1968; Sullivan, 1970; Clegg, 1978).

However, a great deal of controversy in the training literature seems to be directed at measuring participants' or trainee's perceptions per se. Suessmuth (1975) suggests that the following reasons render students' reaction to a training session invalid:

(i) The reaction of a student in a session is less important than what is learned. Learning or changing behaviour is what training is all about.

(ii) The students do not give their honest reactions because they do not want to hurt the instructor's feelings.

(iii) The students do not know what their reactions are, because the current social environment conditions people to hide their true reactions and feelings (p. 24).

Many other writers in the field also maintain the view that participant ratings are not valid evaluative criteria. Some writers like Odiorne (1961) see participant ratings as measuring merely "the entertainment value" of the program. On the other hand, Kohn and
Parker (1969) conducted two studies that indicated that a great deal can be learned by approaching training evaluation from participants' reactions to the training activity. They argued that there was no reason to believe that the views of participants are not sound data providing that reliability is established.

They further added that, "Insight into the factors which make the training activity effective in the eyes of the participants enables those who conduct or sponsor the training program to design the environment so as to maximize the value of the learning experience to the participants" (1969, p. 63).

One proponent in favour of measuring participants' reactions is Andrews (1966). He contends that the best measures of a training program's worth are the opinions of the trainees, with the opinions of the trainers, superiors, subordinates and peers kept closely in second place. He does recognize all the flaws inherent in this sort of criteria, but the opinions of the trainees win by default since, in his view, there are really no accurate tools available for distinguishing before and after states.

It seems, from the literature on training evaluation, that the greatest debate on the merits and demerits of participant's opinions took place around the sixties. Today there seems a general acceptance that participants' perceptions are a part of the total process of evaluation. Frequently, participants' ratings are used together with the ratings of other individuals. For instance, Nienstadt (1979), in his study to determine whether a particular management training
program caused participants to improve certain of their behaviours and attitudes, used participants' and supervisors' perceptions as criteria measures.

2.7 Student Ratings

Research on academic education demonstrates that though the use of formal student appraisals of courses and instructors is widespread, it is still a controversial issue. Diminishing tenure and promotional opportunities, which have resulted from declining enrollments and budget cuts, have made instructors increasingly sensitive to the criteria governing their advancement. The use of student ratings in personnel decisions has been, currently, the subject of considerable interest and investigations.

One of the key issues underlying the use of student ratings is whether or not these ratings, which are often the only measure of teaching effectiveness regularly available, actually reflect effective teaching. The most common criticism of student evaluations is that they are biased by variables unrelated to teaching effectiveness. For instance, Sharon (1970) views student ratings as being influenced by various conscious and unconscious biases such as being lenient in rating the instructor when the student expects to earn a high grade. However, considerable research has been conducted to prove that most background variables such as class size, reason for taking the course, workload, and grade point average have little relationship to such ratings. Stumpf, Freedman and Aguanno (1979) studied a causal network
of relationships among several variables outside of the instructor's classroom control and student ratings. They found that student ratings are relatively independent of external variables and that the students may be able to take into account more factors than generally assumed when they rate their instructors. Studies have also indicated that students have both the ability and maturity to make accurate assessments of teaching effectiveness (Costin, Greenough & Menges, 1971; Doyle & Whitley, 1974).

While controversy continues to surround the use of student ratings of teaching effectiveness, conclusions regarding the reliability, validity and usefulness of student evaluations have been well documented. A reliable measure is one that provides a consistent or stable indication of the characteristic being assessed and is a necessary prerequisite to validity. Feldman (1977), reviewing research on the reliability of student evaluations of teaching effectiveness reported that single rater reliability was low, although class-average reliability was generally high. Marsh, Overall and Kesler (1979) tested some of the assumptions in Feldman's study by carrying out evaluations from the same students at the end of each class and again one year after graduation. Their results indicated that individual student evaluations were remarkably stable over time and were more reliable than previously assumed.

Hogan (1973) conducted a study on similarity of student ratings across instructors, courses, and time. His study sought to answer the following specific questions:
(i) How stable are student ratings of the same instructor, giving the same course during two different semesters?

(ii) How similar are student ratings of the same instructor in two different courses?

(iii) How similar are student ratings of a given course being taught by different instructors?

The results for the case of the same instructor, same course during different semesters, indicated that student ratings were reasonably similar. For the case of the same instructor offering different courses, the correlation was low. However, in the case of the same course with different instructors, substantial correlations were obtained for some factors and insignificant correlations for other factors.

The problem of validity has been addressed adequately in the research. A valid measure would be one which correlates with factors theoretically related to teaching effectiveness and which can be distinguished from "biasing factors" (Crittenden and Norr, 1975, p. 430). Investigations have demonstrated the independence of ratings from such biasing factors as student sex, major, year in school and values; instructor sex and rank; and class size and level (Costin, Greenough & Menges, 1972; Crittenden & Norr, 1973; Centra, 1973).

However, validating the measurement of any complex construct like effective teaching requires the use of many alternative criteria. Studies of what student ratings of instruction really measure have frequently employed student achievement as a validity criterion.
Centra (1977) conducted a study which showed that, although global ratings and achievement were, in general, highly correlated for most courses, the exceptions underscore the need to supplement the ratings with additional criteria of teaching performance.

Marsh et. al. (1979) contend that as long as the faculty continues to question the validity of student evaluations, the usefulness of the evaluations will be severely limited. Furthermore, they add that, "More persuasive demonstrations require criteria for validating student ratings that are both applicable across a wide range of classes and more convincing to the faculty and administrators who use the ratings" (p. 150).

In the study carried out by Marsh et. al. (1979), faculty evaluated their own teaching, and were evaluated by their students, in each of two courses. Despite faculty reservations about the validity of student ratings, there was considerable student-faculty agreement in the ratings obtained. Validity co-efficients were statistically significant for all evaluation factors. These findings reaffirmed the validity of student evaluations and are expected to help reassure the faculty about the accuracy of the student ratings.

In summation, it is apparent from the review of empirical studies that students' ratings or course participants' ratings can provide reliable and valid information on the quality of courses and instruction. As Costin et. al. report,

Research findings suggest that the criteria used by students in their ratings of instructors had
much more to do with the quality of the presentation of material than with the entertainment value of the course per se. Such attributes as preparedness, clarity, and stimulation of students' intellectual curiosity were typically mentioned by students in describing their best instructors (1971, p. 530).

2.8 Self-ratings

Self-ratings are most often used as an adjunct to performance review. The popularity of self-ratings have increased with growing awareness of the need for employee's participation in evaluating their performance. Heneman (1974) goes so far as to suggest that self-ratings could serve as a substitute for the more difficult to obtain superior ratings. However, questions may be raised regarding the potential usefulness of self-ratings as compared to traditionally obtained superior ratings.

A number of studies have found that self-ratings tend to have higher mean values (leniency error) and less variability (restriction or range of error) than do superior ratings (Parker, Taylor, Barrett & Martens, 1959; Prien & Liske, 1962; Thornton, 1968). Blackburn and Clark (1975) found that faculty members gave themselves higher ratings on teaching effectiveness than either their supervisors, colleagues, or students.

Self-ratings are subject to various personal and environmental pressures which cause the rater to be lenient in some cases and over-critical in others. This complex phenomena of self-rating has received only minor attention from researchers. Baird (1977) conducted
a study comparing self and superior ratings of performance as they related to the subordinate's self-esteem and his satisfaction with his supervision. He hypothesized that when asked to rate themselves, individuals' self-concepts and confidence in their abilities will affect their ratings. His findings showed that self-ratings are not only a measure of organizational performance but also an indication of the person's own self-image.

Another important issue pertains to the incidence of halo error in self-ratings. One might assume that intercorrelations among performance dimensions would be consistently higher for self-ratings than superior ratings; the evidence in some research suggests the opposite (Lawler, 1967; Parker et. al, 1959; Prien & Liške, 1962). The contradictory evidence regarding leniency and halo errors was also found in Heneman's research (1974). His study found that self-ratings possessed less leniency, restriction of range and halo error than superior ratings.

Finally, the convergent and discriminant validity of self-ratings has been questioned. No conclusive information is available on this issue. Heneman (1974) reports on some studies that have found favourable convergent and discriminant validity for self and superior ratings. On the other hand, both Lawler (1967) and Nealy and Owen (1970) found little convergent and discriminant validity for self and superior ratings.

There is, however, increasing support in the research for self-ratings. Mingolelli (1979) reports that supportive evidence does exist to suggest that, under carefully planned conditions and for
appropriate purposes, self-ratings can produce seemingly accurate results. According to Bouvette-Isaacson (1974), "There appears to be agreement among the few researchers who have examined self-ratings of teaching effectiveness that the approach to teacher evaluation may be helpful in identifying staff development needs" (p. 14). Heneman (1974) sees self-ratings of managerial performance as being more useful in the following way:

(a) by identifying broad, yet meaningful dimensions of managerial performance;

(b) by assessing self and superior ratings in terms of leniency, restrictions of range, halo and convergent and discriminant validity.

Thornton (1968) points out that self-appraisal in identifying training needs serves to increase the individual's awareness of his need for change and leads to increased motivation to change. Self-ratings are also useful in exploring the dimensions of executive work. Prien and Liske (1962) conducted a study to explore the relation between the first- and second-level supervisor ratings of job performance and incumbent self-ratings of job performance on tasks which were intangible in nature.

Self-ratings have been found to be most useful in comparison with, or as an adjunct to, other ratings, in particular, supervisory ratings. This is in part with current thinking that one should gather ratings from several judges including the employees themselves.
2.9 Studies Related to Comparisons of Different Raters

There is a general agreement in the research that no one position or organizational vantage point can provide the information necessary to determine a person's effectiveness in performing his job (Kilimoski and London, 1974). Several investigators have examined the relationships between two or more raters. The evidence of the kind of relationship between any two raters is fairly mixed.

Sagen (1974) reported little agreement regarding overall effectiveness among student ratings, faculty self-ratings, and department chairmen. Blackburn and Clark (1975) support a similar finding. They conducted a study of ratings of faculty members by administrators, colleagues, students and faculty themselves on two performance measures: teaching effectiveness and overall contribution to the college. They concluded that there was considerable variation in the factors that entered into performance judgements as they were made by colleagues, students, administrators and self. However, both Sagen (1974) and Braustein and Benston (1973) found modest agreement between department chairmen and students concerning certain specific aspects of instruction.

As far as colleague and student ratings are concerned, peer ratings are generally more lenient than student ratings (Doyle and Chrichton, 1978). However, Blackburn and Clark (1975) reported that colleague ratings and self-ratings on the same performance dimension show only slight agreement, while professor and student judgement about teaching performance are in substantial agreement. Aleamoni and Yimer
(1973) found no significant relationship between colleague and student ratings to the instructor's research productivity, but found that colleague ratings were significantly related to academic rank. According to the writers, this indicated that the reputation of the instructors could be influencing colleague ratings.

Doyle and Chrichton (1978) found in their studies, that students, colleagues and the instructors themselves gave ratings that were fairly similar in mean, range, distribution and skew, although colleagues tended to give the most favourable ratings and students the least favourable. They further reported that student, colleague and self-ratings were quite good in convergent validity. Agreement between teacher self-ratings and student ratings was also found by other researchers. Centra (1973) reported a modest relationship between ratings given by the students and teacher self-ratings, while Blackburn and Clark (1975) report a substantial agreement between the two.

There are several reports in the literature of situations in which personnel rated themselves and these ratings were compared with similar ratings by their supervisors. This is discussed in the section below.

Self-ratings compared to supervisor ratings

As was pointed out earlier in the thesis, several researchers have demonstrated that self-ratings tend to be more lenient than supervisory ratings (Blackburn & Clark, 1975; Centra, 1972; Parker et. al., 1959; Prien & Liske, 1962; Thornton, 1968). These results have been shown to be true for lower levels of personnel (Parker et. al., 1959) as
well as for higher level executives (Thornton, 1968; Prien & Liske, 1962). In all the instances, the subordinates were assured that a review of the self-appraisal by the respective supervisor will not occur. It may be hypothesized that in rendering self-rating that will not be reviewed by his superior, the average employee is 'lenient on rating himself'.

The results of a study by Heneman (1974) contradicted the previous evidence of leniency error in self-ratings. He found that self-ratings were less lenient and more viable than superior ratings. However, his findings that self-ratings contained less halo error than did superior ratings were consistent with the previous evidence (Parker et. al., 1959; Prien and Liske, 1962). Evidently, the superiors were evaluating the managers on a more "global" basis than the managers were evaluating themselves. The self-ratings tended to be more discriminating across nine job dimensions of performance that Heneman used for evaluating.

Parker, Taylor, Barrett and Martens (1959) concluded that supervisors may rate largely on the basis of personal bias, which may lean towards harshness or leniency without reference to any established standards.

Studies have shown that while ratings from different levels of superiors tended to agree, superior and self-ratings rarely agreed. Prien and Liske (1962) found that first and second level supervisors agreed among themselves on the performance of the employees, but supervisory ratings did not agree with employee self-ratings. The amount of agreement between supervisor and self-ratings varied with the type of scale used. Both raters agreed substantially on employee
intellectual effectiveness, but less so on employee personal relations effectiveness.

Many studies have reported similar discrepancies between self-ratings and supervisory ratings (Blackburn & Clark, 1974; Bornstein, 1978; Griffiths, 1975; Lawler, 1967; Nealey & Owen, 1970; Thornton, 1968). For supervisor ratings and self-ratings obtained on 27 performance variables, Thornton's study (1968) showed a considerable lack of agreement between the two levels of management. Blackburn and Clark reported that self-ratings made by faculty on their teaching effectiveness had almost no relationships with judgements made by administrators. Similar results of wide disagreements were found in studies of self-appraisal made by managers (Lawler, 1967) and nurses (Nealey and Owen, 1970) when compared to ratings made by their respective supervisors. Griffiths (1975) reported that psychiatric patients' self-assessment did not agree with ratings by supervisors in a rehabilitation unit. Bornstein (1978) reported that supervisors' and graduates' ratings of graduates' performance skills differed dramatically.

There are, however, a few studies which have demonstrated that self-appraisals and supervisor-appraisals do closely correlate. Mingolelli (1979) has reviewed some of these studies and concluded from them that self-ratings can indeed produce accurate assessments of time allocation of job activities, job performance and job ability requirements.

Attempts have been made in the research to understand the relationship between self- and superior ratings. Baird (1977) reported that
the difference between the two ratings was found to be related to the subordinate's self-esteem and his satisfaction with his supervision. The high self-esteem and low performance sub-group members exhibited the highest level of disagreement with their superiors. Their ratings were significantly higher than their superiors' ratings. On the other hand, Brief, Aldag and VanSell (1977) conducted a study to explain the degree of congruence between self- and superior evaluations of subordinate job performance and task structures. Their conclusions were that the study provided little support for the above contention and further research was needed in the area.

In summation, evidence has been presented which has shown marked discrepancies between ratings made by supervisors and those made by the individuals themselves. These disagreements need not be viewed as a mark of unreliability, but instead as an indicator that different job aspects are being accurately perceived and reported. Research, comparing assessments of trainees with their supervisors, is noticeably missing from the literature. Such assessments are useful in identifying the effectiveness of training programs both from the employee's perception and his supervisor's.
3.1 Preliminary procedures

The general problem of evaluating training programs, as pointed out in the previous chapters, stems basically from the problem of choosing the appropriate criteria. The specific problem of ratings as evaluative criteria was arrived at after discussions with training personnel in several Saskatoon industries and also after an examination of the relevant literature.

The preliminary survey of the available management training programs in Saskatoon revealed a very limited choice. The Co-operative College of Canada, Saskatoon, seemed to offer the bulk of management training programs in the city. The Basic Management Course was chosen for this study after a careful analysis of all other programs offered by the college and individual industries in the city. The reasons for studying this program are as follows.

Generally, the courses offered at the college are restricted to the maximum number of twenty-five participants. Although the trainees register in advance, the exact number of participants is not known till the first day of the course. The courses are generally run if half the number of participants turn up. However, the Basic Management Course was being offered twice in 1981, both in February and in March. As the courses were being offered so close together in time, it was possible to study the participants from both the groups. This provided the
possibility of obtaining a relatively larger sample than it would otherwise have been possible. One of the important reasons for choosing this course for the study was that a large part of the course consisted of practical skills which could be evaluated. The enthusiasm and support expressed by the authorities at Co-operative College for studying this course was also a contributing factor in choosing this particular program.

3.2 The specific details of the course

The Basic Management Course has been offered by the Co-operative College of Canada for approximately twenty-five years. It has been, meanwhile, updated a number of times.

The purpose of the course is to develop in participants the concepts of good management and enable them to move from an operative to a managerial role. The course defines management in terms of functions of planning, organizing, controlling and evaluating.

The course introduces the participants to the basic concept of management and explains how this can be applied to the management of personnel, merchandising and finance. More specifically, the course is organized as follows: it identifies the management functions and the kind of work related to each of these functions. This is followed by a discussion of management of personnel, merchandising, credit and finance. The kinds of work a manager is expected to do in each of these areas is identified. Emphasis is placed on developing some familiarity with certain management tasks such as job description, merchandise,
budgets, financial statements and training personnel on the job. The full outline of the course is in Appendix A.

The complete course is offered twice for five full days, usually once in the fall and once in the winter session. However, no course was offered in the fall of 1980 and hence two courses were offered in the next session (in February and March 1981). As mentioned earlier, the number of participants for the course is restricted to a maximum of twenty-five. The course would still be offered if about half this number registered for the course.

Generally, the participants for this course have been either new or experienced managers, or people expecting to get into management positions. In all cases, the participants were expected to have little or no previous study of management concepts. In the past few years this course has attracted participants from all over Western Canada and many from a variety of organizations other than co-operative organizations. The College provides residential facilities for the course participants.

3.3 Methodology

The basic method of this study is as follows: an evaluation (using a written questionnaire) was conducted immediately at the conclusion of the program to collect information on what the participants felt that they had learned regarding certain aspects of the course. This was followed by an evaluation three months after the training program seeking similar information, presumably after the
participants had had some chance to transfer their learning to their job situations. The main objective was to obtain information on the correlations of participants' ratings over a period of time.

At the same time as the participants' three months follow-up, their supervisors at work were also asked their perceptions of how the course had affected the participants' job practices. The objective of this evaluation was to provide information on the differences between the perceptions of the participants and their supervisors, in rating the learning from a training program.

Three separate questionnaires were developed and administered to the groups in the study in the following manner. The end of the course evaluation was given to the participants by the researcher personally, to fill out in the class, immediately at the conclusion of the program. The follow-up questionnaires were mailed to the participants and their supervisors three months after the training event. The questionnaires are in Appendix B.

3.4 Sample size

The expected maximum sample size was fifty participants since the maximum number of trainees allowed to participate in the course was twenty-five. However, for the February 1981 session of the course only fifteen trainees actually participated although many more had pre-registered. The March 1981 session on the other hand, obtained the maximum number of twenty-five participants. This resulted in an initial sample size of forty participants.
All forty participants completed the end-of-the-course evaluations and also provided the names of their supervisors to be contacted for this study. Thirty-five participants' follow-up questionnaires were received on time (one arrived too late to be included in the study). Thirty-nine supervisor questionnaires were received. Since this was a comparative study, only those thirty-five participants who sent in their follow-up questionnaires were used as the final sample. That is, the questionnaires of the thirty-five participants who completed their follow-up evaluations were matched with those of their supervisors and also with their end of the course questionnaires. The rest of the questionnaires from either the supervisors or the participants were not used for this study.

3.5 Developing the instrument

The preliminary stage in developing the instrument was to survey other instruments in the literature that were related to this study. Some of the questionnaires examined were the doctoral dissertations by Bornstein (1978), Bouvette-Isaacson (1979) and Mingolelli (1979). No questions from these studies were incorporated into the questionnaires for this study. However, the instruments from these and other studies provided the researcher with a clear picture of survey instruments used in previous related research.

Literature discussing the design of questionnaires was also examined (Babbie, 1973; Berdie & Anderson, 1974; Drew, 1980; Kerlinger, 1973). Of the literature on questionnaire design, the work of Berdie and Anderson (1974) was found to be most useful.
Several consultations were held with the Coordinator of the Education Program Delivery of the Co-operative College (who is also one of the tutors of this course) about what course content to evaluate. With the exception of the theoretical content of the course, some aspects of every major part of the course were evaluated in the study. That is items from management of credit, management of personnel, management of merchandising and management of finance were included in the evaluation.

A pretest was conducted to determine whether the items being evaluated in the study were actually those practised on the job. This was done by checking with the twenty participants who had attended the Basic Management Training Programs the previous year, 1980. A similar pretest was also conducted with their corresponding supervisors. A telephone survey method was used for the pretest since the participants were from all over Western Canada. The participants in the pre-test group were asked whether the following items were part of their job:

- Calculating stock turnover
- Calculating pricing
- Processing customer claims
- Handling returns of merchandise
- Keeping and using markdown sheets margin
- Ensuring job descriptions are in place for all personnel
- Using four-step method of training personnel on the job
- Identifying key criteria in a financial statement
- Analyzing a financial statement
Calculating gross margins
Using markdown sheets margins
Recruiting, screening and selecting personnel

Only those items which were practised on the job by the majority of those in the pretest group were included in the questionnaires for this study. These are as follows:

- Keeping good pricing practices
- Calculating pricing
- Calculating stock turnover
- Processing customer claims
- Handling returns of merchandise
- Ensuring job descriptions are in place for all personnel
- Using four-step method of training personnel on the job
- Identifying key criteria in a financial statement.

Three sets of questionnaires were developed: participants at the conclusion of the program, participants' three month follow-up questionnaires, and participants' supervisors' questionnaires. Questions relating to hypothesis I were identical in participants' end-of-the-course and follow-up questionnaires. These were perceived competency on the eight items, perceived applicability of the eight items to the individual job situation and perceived support from superiors, co-workers and subordinates in implementing the learning from the course. These questions relating to hypothesis II were identical in participants' follow-up questionnaires and their supervisors' questionnaires. These were participants' perceived competency on the eight items and perceived
applicability of the eight items. A rating scale of one to five was used for the competency and support variable while a rating scale of one to four was used for the applicability variable. Information pertaining to the demographic characteristics of the sample were obtained from end-of-the-course evaluations. Other relevant descriptive information was collected from all of the three questionnaires. This information included the following: reasons for taking the course; perceived benefit after taking the course, perceived difficulties in applying course content, and reaction to certain aspects of the program.

3.6 Administering the instrument

Participants were informed of the study at the start of the training program by the Coordinator of the Education Program Delivery of the College. The purpose of the study was explained in terms of the benefit of such evaluations to the Co-operative College.

Special efforts were made to ensure that ample time was allowed to administer the instruments at the conclusion of the program. At this time the researcher explained the purpose of the study once again and answered any questions related to the evaluation. The fact that the researcher administered the questionnaires instead of the tutor reassured some participants about the degree of confidentiality of this study. Generally, most participants expressed a great deal of support for such a study. All participants willingly supplied the names of their immediate supervisors.

Immediately following the conclusion of the course, a letter was sent by the Coordinator of the Education Program Delivery of the
College, to all supervisors explaining the study to them and seeking their support. The letter is in Appendix C. Three months after the training event, questionnaires were sent to the supervisors with a covering letter which once again explained the purpose of the project. The covering letters are included with the questionnaires which are in Appendix B. Questionnaires were also sent to the participants three months after the training program with a covering letter. All the mailed questionnaires included stamped, addressed envelopes.

Three weeks after mailing the questionnaires, a reminder was sent to those who had not yet responded. See Appendix D. This was followed by one or two phone calls, wherever necessary. After this the follow-up efforts were abandoned. As Drew (1980) points out, "In general, three follow-up contacts seem to be about the optimum, with any more than that probably being viewed as harassment by the respondent" (pp. 125-126).

The response rate was very high for the supervisors (97.5%) who were also most prompt in replying. Similarly, fairly high response was obtained from the participants follow-up group (90%). Thirty-five questionnaires (87.5%) were used in the study with one questionnaire arriving too late to be included. Overall, the return rate of the questionnaires can be considered very good for a follow-up mail survey.

3.7 Analysis of data

The eight items for competency and applicability variables were grouped according to four management functions for ease of administering the statistical tests for testing the hypothesis. These management
functions were credit, merchandise, personnel and finance. The scores of the items in each of the four functions were averaged to obtain the factors (credit functions, merchandise functions, personnel functions and finance functions) for competency and applicability variables.

Computer programs were used for analysis of the data. The Statistical Package for Social Sciences was used to calculate relevant frequencies and to compute Pearson product - moment correlations. Bio-medical Data Processing (BMDP) was used to calculate Hotelling's $T^2$.

For testing the hypothesis that the participants' ratings over time are correlated, Pearson product - moment correlations were computed and Fisher's r to Z transformations were used to obtain confidence intervals. For the hypothesis of differences between the participants' and the supervisors' perceptions, Hotelling's $T^2$ was computed. Details of data analysis are discussed in the next chapter.
CHAPTER 4

RESULTS

4.1 Introductions

The results from this study are outlined in this chapter in the following manner. First the demographic information on the participants is provided, followed by the findings regarding the two hypothesis. In the last part of the chapter, additional evaluative information is provided such as, reasons for taking the course, perceived impeding factors in implementing the learning from the training program and the perceived benefits from the course.

4.2 Characteristics of the Participants

The sample for this study consisted of thirty-five managerial personnel who participated in the Basic Management Course offered by the Co-operative College of Canada, Saskatoon, in February and March 1981.

The majority of the participants came from Saskatchewan (65%). The rest were from other Western provinces (Alberta, 23%; Manitoba, 6% and British Columbia, 6%).

Age

Participants varied in age from about nineteen years to fifty-four years, although about half the group (57%) was between twenty-five and thirty-five years. The specific age breakdown is as follows:
Table 1

Frequency and Percentage Distribution of Participants by Age

(N = 35)

<table>
<thead>
<tr>
<th>Age</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>19 - 24 years</td>
<td>8</td>
<td>23</td>
</tr>
<tr>
<td>25 - 35 years</td>
<td>20</td>
<td>57</td>
</tr>
<tr>
<td>36 - 46 years</td>
<td>5</td>
<td>14</td>
</tr>
<tr>
<td>47 - 54 years</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>100</td>
</tr>
</tbody>
</table>

Occupational titles of participants

The Basic Management Course is offered for those personnel who are either new to management positions or who are aspiring to be managers in the near future. Consequently, it was assumed that the participants for this course will have little or no knowledge of management concepts.

The occupational titles of 88% of the sample indicated with certainty that they were in some kind of supervisory positions. However, the rest (11%) may have been involved in supervisory work but their occupational title did not indicate that with certainty. Table 2 outlines the specific details of the job titles of the participants.
Table 2

Occupational Titles of the Participants

(N = 35)

<table>
<thead>
<tr>
<th>Occupational Titles</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Manager</td>
<td>6</td>
<td>17</td>
</tr>
<tr>
<td>Assistant Manager</td>
<td>4</td>
<td>11</td>
</tr>
<tr>
<td>Department Supervisor</td>
<td>21</td>
<td>60</td>
</tr>
<tr>
<td>Receiver</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Senior Grocery Clerk</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Warehouse Coordinator</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Technical Service Advisor</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>35</td>
<td>100</td>
</tr>
</tbody>
</table>

Length of time in present occupational position

As mentioned earlier, the course is an introductory one in basic concepts and practices of management. As deduced from Table 3, 91% of the participants were in their current positions in the company for less than three years. Assuming that the participants had not been in supervisory positions previously with other companies, then, about 51% of the participants could be considered to be new to supervisory or management positions.
Table 3
Frequency and Percentage Distribution of Participants by Length of Time in Present Occupational Position
(N = 35)

<table>
<thead>
<tr>
<th>Length of Time in Present Occupational Position</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>One year or less</td>
<td>18</td>
<td>51</td>
</tr>
<tr>
<td>Two to three years</td>
<td>14</td>
<td>40</td>
</tr>
<tr>
<td>Four to six years</td>
<td>3</td>
<td>9</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>35</td>
<td>100</td>
</tr>
</tbody>
</table>

Formal educational level

Completion of elementary school education was indicated by about 9% of the participants as the highest formal education level achieved. However, a fairly high percentage of the sample (71%) indicated that they had completed high school.
Table 4

Frequency and Percentage Distribution of Participants by Highest Level of Education Completed

(N = 35)

<table>
<thead>
<tr>
<th>Highest Educational Level Completed</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary School</td>
<td>3</td>
<td>8.6</td>
</tr>
<tr>
<td>High School</td>
<td>25</td>
<td>71.4</td>
</tr>
<tr>
<td>Undergraduate Degree</td>
<td>2</td>
<td>5.7</td>
</tr>
<tr>
<td>Technical Institute and Other</td>
<td>5</td>
<td>14.3</td>
</tr>
<tr>
<td>Post-secondary Training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>100.0</td>
</tr>
</tbody>
</table>

4.3 Hypothesis: Correlations Between Participant's Ratings Over Time

The following null hypothesis was tested in the study:

There is no difference between the participant's assessments of the perceived learning at the conclusion of the training program and their perceptions three months after the training event.

Pearson product-moment coefficients were computed for participants' ratings at the conclusion of the program with their ratings three months after. An 80% confidence interval was established around the correlation coefficient, using Fisher's r to Z transformation. Table 5 presents the full correlation matrix of ratings with the correlations coefficients for each variable being underlined. The proportion of other correlation coefficients in a row that fall above
the lower level of confidence interval for that particular coefficient was noted. This procedure was aimed at determining whether the correlations between participants' ratings of a factor are higher than the correlations between their ratings of that factor and other factors. If no more than two correlation coefficients in a row fell above the lower limit of the confidence interval, then it was assumed that the ratings over time were correlated. Table 6 gives the correlation coefficients, the confidence-intervals and the number of correlations in each row that fell above the lower limit.

It is deduced from the data in Table 6 that, at the 80% confidence level, there are significant correlations for the participants perceptions of applicability (as explained in chapter 3) for credit functions \((r = .7151)\), merchandise functions \((r = .6878)\), personnel functions \((r = .6601)\) and finance functions \((r = .6767)\). However, participant's perceptions of competency are correlated for only one variable (credit function, \(r = .6057\)) and their perceptions of support variable are not correlated. This indicates that the correlations between participants' ratings in this study varied according to the type of variable being rated.

The general finding is that, at the 80% confidence level, the participants' ratings are correlated over a period of three months on five factors out of eleven. Four of these factors were ratings of applicability. Consequently it was decided to retain the null hypothesis only for the applicability variable \((P < .20)\).
Table 5

Intercorrelations Between Participants' Ratings at the End of the Course and Three Months After

(N = 35)

<table>
<thead>
<tr>
<th>Variables</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Credit functions</td>
<td>.6057</td>
<td>.2527</td>
<td>.0315</td>
<td>.1173</td>
<td>.3708</td>
<td>.0446</td>
<td>.1464</td>
<td>.0168</td>
<td>.1950</td>
<td>.2380</td>
<td>.3036</td>
</tr>
<tr>
<td>2. Merchandise functions</td>
<td>.6126</td>
<td>.1635</td>
<td>.0334</td>
<td>.1457</td>
<td>.4913</td>
<td>.3066</td>
<td>.1270</td>
<td>.1396</td>
<td>.1021</td>
<td>.0091</td>
<td>.1058</td>
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<td>3. Personnel functions</td>
<td>.0168</td>
<td>.4750</td>
<td>.2978</td>
<td>.1233</td>
<td>.0118</td>
<td>.1346</td>
<td>.0889</td>
<td>.2221</td>
<td>.2276</td>
<td>.2230</td>
<td>.1756</td>
</tr>
<tr>
<td>Applicability</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Credit functions</td>
<td>.3218</td>
<td>.5393</td>
<td>.0009</td>
<td>.0721</td>
<td>.7151</td>
<td>.8931</td>
<td>.2399</td>
<td>.0316</td>
<td>.0541</td>
<td>.2340</td>
<td>.1633</td>
</tr>
<tr>
<td>7. Personnel functions</td>
<td>.0660</td>
<td>.0422</td>
<td>.5266</td>
<td>.2769</td>
<td>.3867</td>
<td>.1667</td>
<td>.6601</td>
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<td>.5221</td>
<td>.3584</td>
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<tr>
<td>Support</td>
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<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>9. From Superiors</td>
<td>.0842</td>
<td>.2263</td>
<td>.2195</td>
<td>.0819</td>
<td>.1109</td>
<td>.1470</td>
<td>.2476</td>
<td>.0675</td>
<td>.2447</td>
<td>.0883</td>
<td>.0093</td>
</tr>
<tr>
<td>11. From Subordinates</td>
<td>.3426</td>
<td>.3016</td>
<td>.2533</td>
<td>.1528</td>
<td>.3830</td>
<td>.1508</td>
<td>.2286</td>
<td>.0746</td>
<td>.2059</td>
<td>.3364</td>
<td>.1526</td>
</tr>
</tbody>
</table>

Note: Correlations coefficients for each variable are underlined.
Table 6

Correlations Coefficients for Participants' Ratings at The End-of-the-Course and Three Months After

(N = 35)

<table>
<thead>
<tr>
<th>Variables</th>
<th>Correlations Coefficient</th>
<th>80% Confidence Interval</th>
<th>Number of Correlations Falling Above Lower Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>LL*</td>
<td>UL**</td>
</tr>
<tr>
<td>Competency</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit functions</td>
<td>.6057</td>
<td>.450</td>
<td>.725</td>
</tr>
<tr>
<td>Merchandise functions</td>
<td>.1635</td>
<td>.050</td>
<td>.365</td>
</tr>
<tr>
<td>Personnel functions</td>
<td>.2978</td>
<td>.080</td>
<td>.480</td>
</tr>
<tr>
<td>Finance functions</td>
<td>.2197</td>
<td>.005</td>
<td>.415</td>
</tr>
<tr>
<td>Applicability</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit functions</td>
<td>.7151</td>
<td>.590</td>
<td>.805</td>
</tr>
<tr>
<td>Merchandise functions</td>
<td>.6878</td>
<td>.550</td>
<td>.785</td>
</tr>
<tr>
<td>Personnel functions</td>
<td>.6601</td>
<td>.520</td>
<td>.765</td>
</tr>
<tr>
<td>Financial functions</td>
<td>.6767</td>
<td>.540</td>
<td>.775</td>
</tr>
<tr>
<td>Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Supervisors</td>
<td>.2447</td>
<td>.030</td>
<td>.435</td>
</tr>
<tr>
<td>From Co-workers</td>
<td>.1360</td>
<td>.080</td>
<td>.340</td>
</tr>
<tr>
<td>From Subordinates</td>
<td>.1526</td>
<td>.065</td>
<td>.365</td>
</tr>
</tbody>
</table>

*LL = lower limit
**UL = upper limit
4.4 Hypothesis: Differences in Perception Between Participants and Supervisors

The second hypothesis tested in the study is as follows:

There is no difference between the participants' assessments of the perceived learning from the training program and those of their supervisors, three months after the training event.

As a preliminary step, both the participants' and supervisors ratings (three months after the training event) on competency and applicability variable were pooled and correlations were computed using Pearson product-moment correlations. The findings revealed that fourteen of the twenty-eight correlations were .20 or higher, indicating that the items were interrelated (Table 7). Consequently, it was decided that a multivariate analog to the t-test would be the appropriate statistical procedure to determine whether there were differences in perception between the participants and the supervisors. The .05 level of significance was used to retain or reject the hypothesis.

Hotelling's $T^2$ was computed to compare the perceptions between participants and supervisors on all eight variables (Table 8). The results indicated that Hotelling $T^2$ with the value of 21.79, and with the associated F value of 2.44 (8, 81 degrees of freedom) was significant at .023 level. This indicated that there were differences in perceptions between the participants and their supervisors. Consequently it was decided to reject the null hypothesis of no difference between the participants and supervisors ($P < .05$).
Follow-up t-tests were done to determine on which variables the differences occurred. The results are outlined in Table 9. Significant differences were found in the perceptions of the participants and supervisors in rating competency in regard to merchandise functions \((t = 2.15, P < .035)\) and personnel functions \((t = 2.94, P < .004)\). No significant differences were found in the perceptions between the two groups in rating competency with regard to credit functions or financial functions nor in rating applicability of the four factors.

Table 7

Intercorrelations Among the Participants' and Supervisors' Ratings on Eight Variables

\((N = 70)\)

<table>
<thead>
<tr>
<th>Variables</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competency</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Credit functions</td>
<td>1.00</td>
<td>.29</td>
<td>.17</td>
<td>-10</td>
<td>.58</td>
<td>.31</td>
<td>.06</td>
<td>-12</td>
</tr>
<tr>
<td>2. Merchandise functions</td>
<td>1.00</td>
<td>.26</td>
<td>.01</td>
<td>.23</td>
<td>.58</td>
<td>.07</td>
<td>.16</td>
<td></td>
</tr>
<tr>
<td>3. Personnel functions</td>
<td>1.00</td>
<td>.18</td>
<td>.19</td>
<td>.22</td>
<td>.73</td>
<td>.11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Financial functions</td>
<td>1.00</td>
<td>.05</td>
<td>.02</td>
<td>.30</td>
<td>.74</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicability</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Credit functions</td>
<td>1.00</td>
<td>.63</td>
<td>.48</td>
<td>.14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Merchandise functions</td>
<td>1.00</td>
<td>.37</td>
<td>.03</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Personnel functions</td>
<td>1.00</td>
<td>.45</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Financial functions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1.00</td>
</tr>
</tbody>
</table>

Note: The ratings of the two groups were pooled on these eight variables.
Table 8
Differences in Perceptions Between Participants and Supervisors Using All Variables
(N = 70)

<table>
<thead>
<tr>
<th></th>
<th>Hotelling's $T^2$</th>
<th>F Value</th>
<th>$p$</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>21.7962</td>
<td>2.4441</td>
<td>.023</td>
</tr>
<tr>
<td>Degrees of Freedom</td>
<td>8, 61</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 9
Differences in Perceptions Between Participants and Supervisors on Individual Variables
(N = 70)

<table>
<thead>
<tr>
<th>Variable</th>
<th>Means</th>
<th>Standard Deviations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Supervisor</td>
<td>Participant</td>
</tr>
<tr>
<td>Competency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit functions</td>
<td>2.12</td>
<td>2.00</td>
</tr>
<tr>
<td>Merchandise functions</td>
<td>2.01</td>
<td>1.63</td>
</tr>
<tr>
<td>Personnel functions</td>
<td>3.33</td>
<td>2.61</td>
</tr>
<tr>
<td>Finance functions</td>
<td>2.74</td>
<td>2.83</td>
</tr>
<tr>
<td>Applicability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit functions</td>
<td>1.38</td>
<td>1.56</td>
</tr>
<tr>
<td>Merchandise functions</td>
<td>1.53</td>
<td>1.43</td>
</tr>
<tr>
<td>Personnel functions</td>
<td>2.07</td>
<td>1.83</td>
</tr>
<tr>
<td>Finance functions</td>
<td>2.03</td>
<td>2.34</td>
</tr>
</tbody>
</table>

$df = 1, 68$
4.5 Additional Evaluative Information on the Training Program

Additional information concerning various aspects of the training program was also obtained in this study. It is believed that the additional information would enrich the findings related to the evaluation of the Basic Management Course as well as enhance the understanding of the rating problem in management training program.

Reasons for participating in the course

Participants were asked at the conclusion of the program to indicate their reasons for taking the course. The supervisors too were asked their reasons for sending the participant to the course. The reason "to learn skills that would enhance the participant's job performance" was mentioned by 86% of the participants and 77% of the supervisors as one of the reasons. The same reason was also indicated by 74% of the participants as the most important reason for taking the course (Table 10).

Table 10

Participants' Most Important Reason for Taking This Course

(N = 35)

<table>
<thead>
<tr>
<th>Most Important Reason</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>To enhance performance</td>
<td>26</td>
<td>74</td>
</tr>
<tr>
<td>Supervisor sent me</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Hoped to be reclassified or promoted</td>
<td>7</td>
<td>20</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>100</td>
</tr>
</tbody>
</table>
Participants' reasons for taking the course are outlined in Table 11 and supervisors' reasons for sending the participant to the course are outlined in Table 12. About 46% of the participants indicated that one of their reasons for taking the course was that they hoped to be promoted or reclassified. This reason was also given as the most important reason by about 20% of the participants (Table 10), but, only 6% of the supervisors indicated it as one of the reasons for sending the participant to the course. The other significant reason mentioned by 43% of the participants and 29% of the supervisors was that the participant had been promoted and the course content was relevant to his new job.

Perceptions of benefit obtained as a result of participation in the course

Both the supervisors and the participants were asked their perceptions of the benefits that the participant may have obtained as a result of participation in the course. The following analyses were done by matching the participant with his or her supervisor. There were some areas of agreement between both the groups (Table 13). Sixty-nine percent of both the participants and their supervisors agreed that the participant had learned some skills which were useful for his job. The other significant benefit that the participant is perceived to have obtained, according to 66% of both the supervisors and participants, is that the participant has more self-confidence in doing his job. The majority of participants and supervisors agreed that pay increase (83%)
Table 11

Participants' Reasons for Taking the Course at the Conclusion of the Program

(N = 35)

| Reasons                                                   | N | %  
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected to enhance performance as a manager</td>
<td>30</td>
<td>86</td>
</tr>
<tr>
<td>Boss sent me</td>
<td>14</td>
<td>40</td>
</tr>
<tr>
<td>Hope to be reclassified or promoted</td>
<td>16</td>
<td>46</td>
</tr>
<tr>
<td>Will get a pay increase</td>
<td>4</td>
<td>11</td>
</tr>
<tr>
<td>Good chance to get away from job</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Was promoted and the course content seemed relevant to new job</td>
<td>15</td>
<td>43</td>
</tr>
<tr>
<td>Other reasons</td>
<td>7</td>
<td>20</td>
</tr>
</tbody>
</table>

a does not equal 100 percent because participants could give more than one reason.
Table 12

Supervisors' Reasons for Sending the Participants to the Course

(N = 35)

<table>
<thead>
<tr>
<th>Reasons</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Was sent to learn skills useful for his job</td>
<td>27</td>
<td>77</td>
</tr>
<tr>
<td>Was promoted and the course content seemed</td>
<td>10</td>
<td>29</td>
</tr>
<tr>
<td>relevant for his new job</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Was required to take this course for</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>promotion or reclassification</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Was required to take this course for pay</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>increase</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>9</td>
</tr>
</tbody>
</table>

Note: Supervisors could give more than one reason.
Table 13

Supervisors' and Participants' Perceptions of Benefits Obtained as a Result of Participation in the Course

(N = 35)

<table>
<thead>
<tr>
<th>Benefits Obtained</th>
<th>Both Participant and Supervisor</th>
<th>Neither Participant nor Supervisor</th>
<th>Supervisor alone</th>
<th>Participant alone</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learned skills useful for the job</td>
<td>69</td>
<td>3</td>
<td>9</td>
<td>20</td>
<td>101(^a)</td>
</tr>
<tr>
<td>Got promoted or reclassified</td>
<td>3</td>
<td>89</td>
<td>0</td>
<td>9</td>
<td>101(^a)</td>
</tr>
<tr>
<td>Got pay increase</td>
<td>3</td>
<td>83</td>
<td>3</td>
<td>11</td>
<td>100</td>
</tr>
<tr>
<td>Participant has more self-confidence now</td>
<td>66</td>
<td>9</td>
<td>9</td>
<td>17</td>
<td>101(^a)</td>
</tr>
<tr>
<td>Supervisor has more confidence in participant</td>
<td>9</td>
<td>34</td>
<td>37</td>
<td>20</td>
<td>100</td>
</tr>
</tbody>
</table>

\(^a\) does not equal 100 percent due to rounding error.
and promotions (89%) were not one of the benefits obtained from the course.

However, there are differences in perceptions between participants and supervisors on some of the other benefits. For instance, 9% of the participants thought they had got promoted or had been reclassified but none of the supervisors thought so. Similarly, 11% of participants thought they had got a pay increase as a result of participation in the course compared to only 3% of the supervisors who indicated that benefit.

Participants' perceptions of the most important benefit obtained as a result of participation in the course are outlined in Table 14. The most important benefit that 49% of the participants felt that they had obtained as a result of participation in the course was to have gained more self-confidence in doing their jobs. Thirty-seven percent of the participants felt that learning skills useful for the job was the most important benefit.

Supervisors who discussed with the participants ways to implement the new learning

If the training program is to be effectively evaluated, it is important for both the participants and supervisors to discuss ways in which to implement the new learning. In this study, 69% of the supervisors indicated that they had discussed ways in which the participant could implement the new learning to his job situation while 31% of the supervisors had not.
Table 14

Participants' Perceptions of the Most Important Benefit Obtained as a Result of Participation in the Course

(N = 35)

<table>
<thead>
<tr>
<th>Most important reason</th>
<th>N</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learned skills useful for the job</td>
<td>13</td>
<td>37</td>
</tr>
<tr>
<td>Was promoted or reclassified</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Got a pay increase</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Has more self-confidence in doing his or her job</td>
<td>17</td>
<td>49</td>
</tr>
<tr>
<td>Boss has more self-confidence in participants' job performance</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Other reasons</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>35</td>
<td>101</td>
</tr>
</tbody>
</table>

\(^a\) does not equal 100 percent due to rounding error.
Factors impeding the participants from implementing the learning from the training program

In evaluating training programs, it is important to obtain information on the factors that may impede the trainees from implementing the learning from the training program, as perceived by the trainees and their supervisors. In this study both the participants and their supervisors were asked their perceptions of impeding factors on eight items. The participants were asked at the conclusion of the program and three months after while supervisors were asked their perception at the same time as the participants' three months follow-up. The results of their perceptions of impeding factors on each of the eight items are outlined in Tables 15 to 22.

Significant number of participants perceived "no difficulty in implementing the learning from the training program" on the following items:

<table>
<thead>
<tr>
<th>Item</th>
<th>End-of-the-Course</th>
<th>Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculating pricing</td>
<td>71%</td>
<td>71%</td>
</tr>
<tr>
<td>Keeping good pricing practices</td>
<td>71%</td>
<td>69%</td>
</tr>
<tr>
<td>Handling returns of merchandise</td>
<td>66%</td>
<td>74%</td>
</tr>
<tr>
<td>Calculating stock turnover</td>
<td>68%</td>
<td>71%</td>
</tr>
</tbody>
</table>

On the other hand, the only item where a significant number of supervisors (60%) felt that the participants were having no difficulty in implementing it on the job was calculating pricing.

The general deductions from Tables 15 to 22 is that both the participants and the supervisors perceive some impeding factor in
implementing each of the eight items to the participants' job situation. However, the type of impeding factor perceived varied with the item rated as well as with the ratee group (participants end-of-the-course, participants three months after and supervisors).

The factor "did not learn adequately" was perceived as a minor impeding factor by participants and supervisors for all items with one exception. Twenty-six percent of the supervisors perceived that the participants had not learned adequately to identify key criteria in a financial statement.

Participants' "difficulty in changing former habits" was perceived as an impeding factor more for implementing personnel functions than for other functions. This factor was perceived to have kept the participants from using the four-step method of training personnel on the job by 26% of the supervisors, 23% of the participants three months after the training event and by 17% of the participants at the conclusion of the program. It was also mentioned as an impeding factor for ensuring job descriptions are in place for all personnel by 14% of the supervisors, 26% of the participants three months after the course and 20% of the participants at the end of the course.

Participants generally felt that the factor that their "supervisors thought no changes are necessary" was not a significant impeding factor. However, the supervisors perceived this differently on some items, noticeably on keeping good pricing practices on the job. For this item, 14% of the supervisors indicated that they did not think any changes are necessary and yet none of the participants perceived this factor as an impeding one for that item.
It has been generally accepted that when management personnel get back to their jobs after a week at a training event, their backlog of work is enough to keep them from reflecting on the training. In this study, however, the factor that the participants were "too busy on the job to implement new learning" was seen as a significant impeding factor only for personnel functions. The factor that the participants were too busy on the job was mentioned as a factor impeding the use of four-step method of training personnel on the job by 23% of supervisors and 17% of participants three months after the training. The same factor was also indicated as an impeding factor for ensuring job descriptions are in place for all personnel by 17% of the participants on their follow-up questionnaires.

There were some discrepancies in perceptions between the participants and supervisors on what was "not part of the participants job". However, the areas that seemed to be indicated by a significant number of participants and supervisors as not being part of the participants job are:

Ensuring job descriptions are in place for all personnel
(Supervisors 43%; participants follow-up 26%; participants end-of-the-course 26%)

Processing customer claims on the job (Supervisors 11%; Participants follow-up 26%; participants end-of-the-course 23%)

Identifying key criteria in a financial statement
(Supervisor 26%; participants follow-up 37%; participants end-of-the-course 37%).
Table 15

Perceptions of Factors Impeding the Participant from Keeping Good Pricing Practices on the Job

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Participants' difficulty in changing former habits</td>
<td>5</td>
<td>14</td>
<td>6</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>5</td>
<td>14</td>
<td>0</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>4</td>
<td>11</td>
<td>3</td>
</tr>
<tr>
<td>No difficulty in implementing this learning</td>
<td>19</td>
<td>54</td>
<td>24</td>
</tr>
<tr>
<td>Other reasons</td>
<td>1</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>99&lt;sup&gt;a&lt;/sup&gt;</td>
<td>35</td>
</tr>
</tbody>
</table>

<sup>a</sup> does not equal 100 percent due to rounding error.
Table 16

Perceptions of Factors Impeding the Participant from Calculating Pricing on the Job

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>3</td>
<td>9</td>
<td>1</td>
</tr>
<tr>
<td>Participants' difficulty in changing former habits</td>
<td>3</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>3</td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>3</td>
<td>9</td>
<td>2</td>
</tr>
<tr>
<td>No difficulty in implementing new learning</td>
<td>21</td>
<td>60</td>
<td>25</td>
</tr>
<tr>
<td>Other reasons</td>
<td>1</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>102¹</td>
<td>35</td>
</tr>
</tbody>
</table>

¹ Does not equal 100 percent due to rounding error.
Table 17

Perceptions of Factors Impeding the Participant from Calculating Stock Turnover on the Job

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>4</td>
<td>11</td>
<td>1</td>
</tr>
<tr>
<td>Participants' difficulty in changing former habits</td>
<td>4</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>5</td>
<td>14</td>
<td>0</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>4</td>
<td>11</td>
<td>1</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>6</td>
<td>17</td>
<td>3</td>
</tr>
<tr>
<td>No difficulty in implementing this learning</td>
<td>10</td>
<td>29</td>
<td>25</td>
</tr>
<tr>
<td>Other reasons</td>
<td>2</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>99a</td>
<td>35</td>
</tr>
</tbody>
</table>

a does not equal 100 percent due to rounding error.
Table 18

Perceptions of Factors Impeding the Participant from Processing Customer Claims on the Job

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Participants' difficulty in changing former habits</td>
<td>5</td>
<td>14</td>
<td>4</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>4</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>1</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>4</td>
<td>11</td>
<td>9</td>
</tr>
<tr>
<td>No difficulty in implementing this learning</td>
<td>19</td>
<td>54</td>
<td>13</td>
</tr>
<tr>
<td>Other reasons</td>
<td>1</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>99&lt;sup&gt;a&lt;/sup&gt;</td>
<td>35</td>
</tr>
</tbody>
</table>

<sup>a</sup> does not equal 100 percent due to rounding error.
Table 19

Perceptions of Factors Impeding the Participant from Handling Returns of Merchandise on the Job

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Participants' difficulty in changing former habits</td>
<td>6</td>
<td>17</td>
<td>4</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>2</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>5</td>
<td>14</td>
<td>3</td>
</tr>
<tr>
<td>No difficulty in implementing this learning</td>
<td>19</td>
<td>54</td>
<td>26</td>
</tr>
<tr>
<td>Other reasons</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>100</td>
<td>35</td>
</tr>
</tbody>
</table>
Table 20

Perceptions of Factors Impeding the Participant from Ensuring Job Descriptions are in Place for All Personnel on the Job

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>%</td>
<td>N</td>
<td>%</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>2</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Participants' difficulty in changing former habits</td>
<td>5</td>
<td>14</td>
<td>9</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>4</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>15</td>
<td>43</td>
<td>9</td>
</tr>
<tr>
<td>No difficulty in implementing this learning</td>
<td>7</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td>Other reasons</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>35</td>
<td>100</td>
<td>35</td>
</tr>
</tbody>
</table>

a does not equal 100 percent due to rounding error.
Table 21

Perceptions of Factors Impeding the Participant from Using
Four-Step Method of Training Personnel on the Job

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>3</td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td>Participants' difficulty in changing former habits</td>
<td>9</td>
<td>26</td>
<td>8</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>8</td>
<td>23</td>
<td>6</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>6</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>No difficulty in implementing this learning</td>
<td>7</td>
<td>20</td>
<td>14</td>
</tr>
<tr>
<td>Other reasons</td>
<td>1</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>35</td>
<td>101a</td>
<td>35</td>
</tr>
</tbody>
</table>

a does not equal 100 percent due to rounding error.
Table 22

Perceptions of Factors Impeding the Participant from Identifying Key Criteria in a Financial Statement

(N = 35)

<table>
<thead>
<tr>
<th>Perceived impeding factors</th>
<th>Supervisor</th>
<th>Participant follow-up</th>
<th>Participant end-of-the-course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N</td>
<td>%</td>
<td>N</td>
</tr>
<tr>
<td>Did not learn adequately</td>
<td>9</td>
<td>26</td>
<td>3</td>
</tr>
<tr>
<td>Participants' difficulty in changing habits</td>
<td>3</td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td>Supervisor does not think any changes are necessary</td>
<td>1</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Too busy on the job to implement new learning</td>
<td>4</td>
<td>11</td>
<td>1</td>
</tr>
<tr>
<td>Not part of participants' job</td>
<td>9</td>
<td>26</td>
<td>13</td>
</tr>
<tr>
<td>No difficulty in implementing this learning</td>
<td>8</td>
<td>23</td>
<td>13</td>
</tr>
<tr>
<td>Other reasons</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>35</td>
<td>101a</td>
<td>35</td>
</tr>
</tbody>
</table>

*a does not equal 100 percent due to rounding error.*
Evaluative statements of some aspects of the course

The participants (at the conclusion of the program) and the supervisors (three months after) were asked to give their reactions to certain aspects of the course. The general reactions of the participants and the supervisors regarding the overall effectiveness of the course were favourable. Ninety-four percent of the participants (Table 23) and of the supervisors (Table 24) indicated that the program was worthwhile in terms of its cost and participants' time away from normal job duties.

There was unanimous agreement among the participants that the quality of instruction was not poor. However, 14% of the participants seemed to perceive that the material covered was too difficult. Only a small percent of participants (6%) felt that they did not learn any new concepts in the course compared to 12% of the supervisors who felt the participant did not learn any new concepts.

The conclusions from this study and the various implications of the findings are discussed in the next chapter. An attempt is also made in the chapter that follows to make recommendations for future research in the field of management training program.
Table 23

Participants' General Evaluations of Some Aspects of the Course at the Conclusion of the Program

(N = 35)

<table>
<thead>
<tr>
<th>Evaluative Statements</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>Don't Know</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>The course was not worthwhile in terms of the cost and my time away from work</td>
<td>3</td>
<td>3</td>
<td>37</td>
<td>57</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>The material covered was too difficult</td>
<td>0</td>
<td>14</td>
<td>57</td>
<td>29</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>Did not learn any new concepts</td>
<td>0</td>
<td>6</td>
<td>23</td>
<td>69</td>
<td>3</td>
<td>101</td>
</tr>
<tr>
<td>The course content is not applicable to my job</td>
<td>0</td>
<td>6</td>
<td>26</td>
<td>69</td>
<td>0</td>
<td>101</td>
</tr>
<tr>
<td>The quality of instruction was poor</td>
<td>0</td>
<td>0</td>
<td>14</td>
<td>86</td>
<td>0</td>
<td>100</td>
</tr>
</tbody>
</table>

*a does not equal 100 percent due to rounding error.
Table 24

Supervisors General Evaluations of Some Aspects of the Course

(N = 35)

<table>
<thead>
<tr>
<th>Evaluative Statements</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>Don't Know</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>The program was not worthwhile in terms of its cost and participants' time away from normal job duties</td>
<td>3</td>
<td>0</td>
<td>71</td>
<td>23</td>
<td>3</td>
<td>100</td>
</tr>
<tr>
<td>The participant does not seem to have learned any new concepts</td>
<td>3</td>
<td>9</td>
<td>71</td>
<td>17</td>
<td>0</td>
<td>100</td>
</tr>
<tr>
<td>The course is not applicable to participant's job duties at present</td>
<td>6</td>
<td>3</td>
<td>63</td>
<td>26</td>
<td>3</td>
<td>101</td>
</tr>
</tbody>
</table>

\(^a\) does not equal 100 percent due to rounding error.
5.1 Summary of the Nature and Purpose of the Study

The general purpose of the study was to provide an understanding of assessments of a training program by the participants and their supervisors. Specifically, the study served the following main objectives:

a) To investigate the correlations between participants' ratings over time.

b) To compare participants' ratings with that of their supervisors.

Two null hypotheses were tested in the study. These were:

i) There is no difference between the participants' assessments of the perceived learning at the conclusion of the training program and their perceptions three months after the training event.

ii) There is no difference between the participants' assessments of the perceived learning from the training program and those of their supervisors, three months after the training event.

The sample consisted of thirty-five participants who attended the Basic Management course at the Co-operative College of Canada, Saskatoon in February and March 1981, and their supervisors. The general methodology of the study was as follows. Three sets of questionnaires were developed and administered to the participants and their supervisors in the following manner. Immediately at the conclusion of the course, an end-of-the-course evaluation was administered to the participants to collect information on participants' perceptions.
about certain aspects of the course. Three months after the program, the participants and their supervisors were both mailed questionnaires to seek their perceptions of the course then, presuming that the participants had had some chance to implement the learning from the training program.

The data obtained from the participants' end-of-the-course and three months follow-up questionnaires provided information on the correlations between participants' ratings over a period of three months. The comparison of the data from participants' follow-up and supervisors questionnaires provided information on the differences in perceptions between the two groups.

5.2 Limitations of Findings and Conclusions

The findings of the present study are limited by the size of the sample, by the use of one type of management training program and by a certain amount of "noise" unavoidable in a complex field studies of this sort. For these reasons, no attempt is made in the study to generalize the findings to other management training programs and the conclusions from the thesis are limited to the Basic Management course. Nevertheless, the study may be useful to those interested in the problem of ratings in evaluating management training programs. The summary of the findings and the conclusions are discussed below.
5.3 Summary of Results and Conclusions

1) Characteristics of the participants

The participants in the sample varied in age from nineteen years to fifty-four years, with 57% being in the age group of twenty-five to thirty-five years. All but 9% had completed high school, with 6% having undergraduate degrees and 14% technical training.

The majority of the participants (89%) who attended the Basic Management course were in some kind of management or supervisory positions in their companies. However, 91% of the participants had been in their current positions for less than three years. This met one of the basic requirements of the course, which is that the participants either be new to management positions or aspiring to be managers in the near future.

2) Hypothesis: Correlations between participants' ratings over time

The data on the hypothesis that the participants' ratings are correlated from the time of conclusion of the training program to three months after, revealed the following. At the 80% confidence level, the participants' perceptions of applicability are significantly correlated for credit functions ($r = .71$), merchandise functions ($r = .68$), personnel functions ($r = .66$), finance functions ($r = .67$) and their perceptions of competency are correlated for credit functions ($r = .60$). However, the participants' ratings of competency are not correlated for the other three functions nor for any of the support functions. It was therefore, decided to retain the null hypothesis of
no difference between the participants' assessments of the perceived learning at the conclusion of the training program and their perceptions three months after the training event only for the applicability variable (\(P < .20\)).

Previous research supporting this hypothesis was not found in the field of evaluation of training programs. However, related research in the field of instructional education supports the findings of correlations between the participants' ratings over a period of time. Marsh and Overall (1979) found remarkable agreement between student ratings at the end of the semester and ratings by the same student one year after completion of their degrees. Hogan's study (1973) of similarity between student ratings across instructors, courses and time reported reasonably similar ratings of the same course offered during different semesters.

Most of the above studies in instructional education are limited to the verification of student ratings of instructors and courses over a period of time. The hypothesis in this research, however, relates to the correlations between participants' self-assessments over a period of three months. Nevertheless, the studies relating to the consistency of student ratings over time provide some support to the possibility for future research in training evaluation investigating the correlations between the participants ratings over time.

Two major conclusions were drawn from the findings that there were significant correlations for participants' ratings over time for the
applicability variable but not for competency or support variable. One is that the participants' ratings of applicability of the training program to his job situation are consistent over a period of three months. The other conclusion is that the correlations between participants' ratings varied according to the type of variable being rated.

These conclusions have several implications. It is implied that participants are better able to evaluate the variables that are more objective, e.g. perceived applicability than those that are more subjective, e.g. perceived competency or perceived support. The possible explanation for this is that the more that subjective evaluation is elicited by the rating item, and the greater is the degree of inference required on the participants' part, the less "objective" is the rating and presumably the more random and systematic error that is created. Several studies in the instructional education field deal with the objectivity of the students ratings (Feldman, 1977; Sharon & Bartlett, 1969). However, these studies are generally concerned with creating an unbiased environment for student ratings and thus increasing the objectivity of student ratings. No literature was found that dealt with the problem of objectivity or subjectivity of a rating item or a measure. It is hoped that future researchers would give this serious consideration and attempt to substantiate the conclusions of this thesis.

The other implication is that the rating of the competency and support attributes change over time. The data in Table 25 (Appendix E)
shows that participants' perceptions of competency and support have indeed changed from the conclusion of the program to three months after. In fact, the participants have rated themselves lower on competency and support while on the job than at the end of the program. There is one possible explanation for this. Research on end-of-the-course evaluation contends that most participants feel "good" at the conclusion of the program and hence tend to rate on the higher side (Odiorne, 1961; Suessmuth, 1975). However, once back on the job, this feeling seems to wane and this may explain the comparatively lower rating of competency and support by participants three months after the training event. The implications for evaluation of training programs from some of the discussion above will be outlined later in this chapter.

3) Hypothesis: differences in perceptions between participants and supervisors

The null hypothesis of no difference between the perceptions of supervisors and the participants, three months after the training event was tested in the study. The findings showed that Hotellings' $T^2$ with the value of 21.79, and with the associated F value of 2.44 was significant at 0.23 for all variables. This indicated that there were differences in perceptions between the participants and the supervisors. Therefore, the null hypothesis of no difference between the participants' assessments of the perceived learning from the training program and those of their supervisors, three months after the training event, was rejected ($P < .05$).
Follow-up t-tests were done to determine on which variables the differences occurred. The results are outlined in Table 9. The t-tests were significant for competency in merchandise functions \( (t = 2.15, P < .035) \) and in personnel functions \( (t = 2.94, P < .035) \). Supervisors' and participants' perceptions did not differ in rating competency in credit functions and financial functions as well as in rating applicability of any of the four functions.

There was a possibility of Type I Error occurring in rejecting the null hypothesis. However, since this is one of the first studies of its kind in evaluating management training programs, accepting the null hypothesis when it should be rejected is considered a greater error. Moreover, the effective transfer of training to the job situation requires the understanding of perceptions of supervisors as well as participants; yet, the studies related to evaluation of training programs have generally ignored the supervisors' assessments of the training programs. It is hoped that the findings from this study would encourage further research in this area.

One obvious conclusion from the findings is that the participants and the supervisors differ in their assessments of a training program. Support for this conclusion from the training literature is not available. However, studies in the fields of performance appraisals and instructional education do support the differences in perceptions between self and superior evaluations (Blackburn & Clark, 1974; Bornstein, 1978; Griffiths, 1975; Lawler, 1967; Nealey & Owen, 1970; Prien & Liske, 1962; Thornton, 1968).
The differences between the participants and supervisors is also supported by other data from this study. Participants and supervisors differed on some of the reasons for participants taking the Basic Management course. About 46% of the participants indicated that one of their reasons for taking this course was to get promoted or reclassified but only 6% of the supervisors indicated that reason for sending the participant to the course. Similar differences in perceptions were also found between the two groups of ratees about the perceived benefits obtained as a result of participation in the course. These differences were again in the areas of promotion or reclassification or salary increases as being one of the benefits obtained as a result of participation in the course (see Table 13). Differences in perceptions between the participants as well as their supervisors were also found on factors impeding the participants from implementing the learning from the training to the job situation (Table 15 to Table 22).

The findings that significant differences between the participants and supervisors were found in the rating of competency and not in the ratings of applicability leads to the conclusion that participants and superiors assessments varied according to the type of variable being rated. Similar conclusions were also reached after examining the data on factors impeding the participants from implementing the learning from the training. It was concluded that the type of impeding factor varied with the item being rated as well as with the ratee group (participants at the conclusion of the program, participants three months after, and supervisors).
Implications arising from these conclusions are as follows. The difference in the competency rating between the two groups implies that the supervisors perceive participants' job performance differently from the way the incumbent perceives it. The other possible explanation could be that competency is a more subjective attribute as compared to applicability, with the latter requiring less inference from the ratee group.

As pointed out earlier, the literature generally supports the hypothesis of differences between self and superior evaluations. However, what is of particular significance in the findings of this study is the agreement between self and supervisor ratings of applicability of training to participants' job situation. It is reasonable to assume that since management jobs are multi-dimensional and hard to define some differences in perceptions between participants and their supervisors would occur. However, the agreement between the participants and their supervisors regarding the applicability of the training program to the participants' job implies that both the supervisors and the participants have similar perceptions of the incumbents' job responsibilities.

Many researchers have attempted to explain inconsistencies between self and superior evaluation in terms of leniency errors. In many such studies, self-ratings have been reported to be more lenient than the superior ratings (Blackburn & Clark, 1975; Parker et. al., 1959; Prien & Liske, 1962; Thornton, 1968). In this study, participants' ratings of
competency in three management functions were higher than those of their supervisors (Table 9), thus supporting the leniency theory.

5.4 Implications for Evaluation of Training Programs

The findings from this study regarding participants' evaluation over time has implications for the end-of-the-course evaluation. It was found that the participant ratings at the conclusion of the program, and a few months after, varied according to the type of variable being rated. If the variable elicited more inference from the participants, then there was a greater likelihood of disagreement between participants ratings over time. This implies that unless the rating items or measures used in the end-of-the-course evaluations have been verified as being "objective" and consistent over time, the usefulness of the end-of-the-course evaluations will be limited to that point in time only. In other words, end-of-the-course evaluations cannot effectively measure the long term effect of training programs.

In the meantime, the trainers in the field who continue to use the end-of-the-course evaluations can do the following to reduce the degree of inference in a measure:

a) Use a more visible attribute or the attribute that participants have more direct information on.

b) Consider behavioral attributes rather than predispositional attributes or attitudinal attributes.

The finding that self-ratings are more lenient than supervisor ratings has implications for limited use of self-ratings on their own.
It also supports the contention of this thesis that self-ratings should be supplemented with other ratings, in particular the superior ratings to provide a more balanced view of the training program as it relates to the organizational goal.

Furthermore, program planners need information from both the supervisors and participants in order to effectively evaluate the training program. They need information such as whether the needs and objectives of both the participants and their organizations are being met in the course. The disagreement between program participants and their supervisors would imply that the training program is not meeting some needs of either the participant or the organization.

The findings that participants and supervisors ratings varied according to the variable being measured have implications for the evaluation instrument. In developing an instrument that is to be administered to two different ratee groups, validity and reliability issues need to be addressed. The items in the measuring instrument should be written as unambiguously as possible. An ambiguous item can be interpreted in more than one way and permits error variance to creep in. Clear and standard instructions would also lead to reduced errors of measurement.

5.5 Recommendations for Future Research

The findings and conclusions from this study indicate the following directions for future research:

(i) Replication of this study should be carried out using larger samples and other management training programs.
(ii) Attempt should be made to find variables that indicate agreement between participants' ratings over time.

(iii) The relationship between the objectivity of the rating item and the rating group, at two different points in time, should be investigated.

(iv) To discern any relationship between the ratee group and the type of item being rated. Such future research may also explain the findings that the type of impeding factor perceived varied with the item rated as well as with the ratee group.

In conclusion, it is hoped that this thesis would provide a base for further research into the area of evaluating management training programs.
REFERENCES


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Appendix A

CO-OPERATIVE COLLEGE OF CANADA

COURSE OF STUDY

I. #125 BASIC MANAGEMENT

II. OBJECTIVE

To introduce the basic concepts of management and how these can be applied to the management of personnel, merchandising, and finance.

III. CLIENTELE

New managers and experienced managers with no previous study of management concepts.

IV. SITUATION ANALYSIS

A. This course has been used for a lot of years for the training of managers in the Retail System.

B. For a number of years it was assumed that this training would be done on the job.

C. Now there is a demand for this course.

D. To satisfy this demand, the lesson plans will be rewritten, material up-dated, and the course conducted when requested.

V. UNITS OF INSTRUCTION – INSTRUCTIONAL OBJECTIVES

A. Introduction

Objectives

1. To know the instructor, the College, each other and the course content.

B. Retail Systems Manual

Objectives

1. Able to use the Retail Systems Manual to answer questions or solve problems.
C. Pre-Course Assignment

Objectives

1. To gather some data and learn a few calculation procedures to the course.

D. What is Management?

Objectives

1. To understand the basic concepts of management and to develop a willingness to accept that management is important, responsible work which can be learned.

E. Management of Personnel

Objective

1. To understand the meaning of "Management of Personnel". Be able to identify the kinds of work involved and recognize responsibility for this area.

2. To comprehend that there are different methods and different tools that can be used in the recruitment, screening and selection area.

3. To respond positively to the concept that managers are responsible for the development training of their subordinates and understand some of the methods being used.

F. Management of Merchandising

Objective

1. To understand the meaning and importance of merchandising.

2. To understand that the functions of management, (planning, controlling, etc.) must be applied to efficiently perform the merchandising functions.

G. Management of Finance

Objective

1. To understand that there are three main areas in the Financial Statement, content and format of the statement and where to find information in the statement.
2. To be able to analyze a Financial Statement by using ratios and percentages which can be compared to predetermined standards.

H. Management of Credit

Objective

1. To understand the meaning of credit, why co-operatives use it, and the effects of credit trading.

2. To comprehend some of the areas involved in the effective management of credit.

3. Able to use some ratios and percentages to analyze accounts receivable.
APPENDIX B

COOPERATIVE COLLEGE - SASKATOON

BASIC MANAGEMENT TRAINING PROGRAM EVALUATION

Participants' end of the Course Evaluation

The purpose of this brief questionnaire is to provide you with an opportunity to indicate your feelings about the Basic Management Program in which you have participated.

The information from this questionnaire will provide the Cooperative College with an overall assessment of the program and will suggest ways in which the program could be revised to improve its usefulness to future participants.

To ensure the success of this project, it is extremely important that we get responses from every single participant of this course. Your response to this questionnaire is crucial for this study. Please take some time now and complete this brief questionnaire.

The information from this survey will be analyzed by Mrs. Izzat Jiwani, a graduate student in the Department of Continuing Education at the University of Saskatchewan.

Please be assured that the specific information which you will provide will be used in utmost confidence.
Basic Management Training Program

INSTRUCTIONS

For each of the following items, please check the appropriate answer or fill in the blank. There are several items in which you will be asked to use the code provided.

1. Name ________________________________

2. Immediate Supervisor's name ________________________________

3. Age _____

4. Present position in the company ________________________________

5. How long have you held your present position? _____years _____months

6. The highest level of education you have achieved is:
   1. Elementary school _____
   2. High school _____
   3. Some university _____
   4. Undergraduate degree _____
   5. Graduate degree _____
   6. Technical institute _____
   7. Other post-secondary training _____
   8. Other (please specify) _____

7. We are interested in your reaction about the several aspects of the course. Please use the following code (number) to indicate your answer in the space opposite each item.
   1. Strongly agree
   2. Agree
   3. Disagree
   4. Strongly disagree

PLEASE ANSWER ALL ITEMS:

a. The program was not worthwhile in terms of its cost and my time away from normal job duties. _____

b. Some of the material covered in the course was too difficult. _____

c. I did not learn any new concepts. _____

d. The course is not applicable to my job. _____

e. The quality of instruction was poor. _____

(Over)
8. Please indicate your reasons for taking this course. Check as many reasons as apply.
   a. I expected to enhance my performance as a manager.  
   b. My boss sent me.  
   c. I hope to be reclassified or to get a promotion.  
   d. It will give me a pay increase.  
   e. It was a good chance to get away from my job.  
   f. I was promoted and took this course.  
   g. Other (please specify) ___________________________  

9. Please refer to the previous question (Question 8) and indicate which was your most important reason for taking this course. Please indicate your answer by using the appropriate letter. 
   Reason number _____  

10. In each of the tasks listed below, please indicate how competent you feel you will be in carrying out the tasks. Please use the following code (number) to indicate your answer in the space opposite each item.

1. Competent to a very large extent  
2. Competent to a reasonable extent  
3. Competent to a small extent  
4. Not competent at all  

PLEASE ANSWER ALL ITEMS:  
   a. Keeping good pricing practices.  
   b. Calculating pricing.  
   c. Calculating stock turnover.  
   d. Processing customer claims.  
   e. Handling returns of merchandise.  
   f. Ensuring job descriptions are in place for all personnel.  
   g. Using four-step method of training personnel on the job.  
   h. Identifying key criteria in a financial statement.  
11. We are interested in finding out how much of the course content is applicable to your present job. Please use the following code (number) to indicate your answer in the space opposite each item.

1. This definitely applies to my job at present time.
2. This applies somewhat to my present job.
3. This is a minor part of my present job.
4. This does not apply to my present job.

PLEASE ANSWER ALL ITEMS:

a. Keeping good pricing practices. ______ 34
b. Calculating pricing. ______ 35
c. Processing customer claims. ______ 36
d. Calculating stock turnover. ______ 37
e. Handling returns of merchandise. ______ 38
f. Ensuring job descriptions are in place for all personnel. ______ 39
g. Using four-step method of training personnel on the job. ______ 40
h. Identifying key criteria in a financial statement. ______ 41

12. How much support do you perceive you will get on the job from your superiors, your co-workers and your subordinates to help you implement the learning from the course. Please use the following code (number) to indicate your answer in the space opposite each item.

1. A lot of support
2. Reasonable support
3. Not sure
4. Little support
5. No support

PLEASE ANSWER ALL ITEMS:

a. Support from your superiors. ______ 42
b. Support from your co-workers. ______ 43
c. Support from your subordinates. ______ 44

(Over)
13. We are interested in identifying any factors which may keep you from implementing your learning from this course on the job. For each of the aspects of the course listed below, indicate which one of the following factors you feel will interfere most with implementing your learning. You may use one of the following factors provided to indicate your answer.

1. I did not learn adequately to apply to the job.
2. My own difficulty in changing former habits.
3. I may not get enough encouragement or assistance from my superiors.
4. I am too busy on the job to implement the new learning.
5. It is not part of my job.
6. There is no difficulty foreseen in implementing this learning.
7. Other (please specify) ______________________

PLEASE ANSWER ALL ITEMS:

a. Keeping good pricing practices. _____

b. Calculating pricing. _____

c. Processing customer claims. _____

d. Calculating stock turnover. _____

e. Handling returns of merchandise. _____

f. Ensuring job descriptions are in place for all personnel. _____

g. Using four-step method of training personnel on the job. _____

h. Identifying key criteria in a financial statement. _____

PLEASE CHECK ONCE AGAIN TO MAKE SURE YOU HAVE ANSWERED ALL THE QUESTIONS.
Thank you for your cooperation.
A few days ago, you received a letter reminding you of the Cooperative College's intention of doing a follow-up evaluation of their Basic Management Training Program.

The purpose of this questionnaire is to solicit information from you regarding your feelings about the Basic Management Training Program in which ___________________ participated about three months ago.

The information you provide by answering this questionnaire will suggest ways in which the program could be revised to improve its usefulness for future participants and their organizations.

To ensure the success of this project, it is extremely important that we get responses from the supervisors of every single participant of this course. Your response to this questionnaire is crucial for the success of this study. Please complete this questionnaire today and mail it back to us in the envelope which is provided.

The information from this survey will be analyzed by Mrs. Izzat Jiwani, a graduate student in the Department of Continuing Education at the University of Saskatchewan.

Please be assured that the specific information which you provide will be used in utmost confidence.

Please do not put off answering this questionnaire - we need your help and are counting on your good will.

PLEASE RETURN TO:

Mrs. Izzat Jiwani
74 Columbia Drive
SASKATOON, Saskatchewan
S7K 1E5
Basic Management Training Program

INSTRUCTIONS

For each of the following items, please use the code provided for each question. For some items, you may be asked to fill in the blank or check the appropriate item.

1. Name ____________________________________________

2. Why was the participant sent to this course?
   a. I sent the participant to learn something he/she could use on the job.
   b. The participant was promoted and took this course because its content were relevant to his/her new job.
   c. The participant was required to take this course to get a promotion or to get reclassified.
   d. The participant was required to take this course to get a pay increase.
   e. Other (please specify) ____________________________

3. Did you discuss with the participant ways to implement what he/she learned after the participant returned from this course?
   a. Yes _____
   b. No _____
      Comments _________________________________________

4. We are interested in your reaction about some aspects of the course. Please use the following code (numbers) to indicate your answer in the space opposite each item.
   1. Strongly agree.
   2. Agree.
   3. Disagree.
   4. Strongly disagree.

  PLEASE ANSWER ALL ITEMS:
   a. The program was not worthwhile in terms of its cost and the participant's time from normal job duties. __________________
   b. The participant does not seem to have learned any new concepts. __________________
   c. The course is not applicable to participant's normal job duties at present. __________________

(Over)
5. How competent do you feel the participant is after taking the course in doing the following tasks on the job? Please use the following code (numbers) to indicate your answer in the space opposite each item.

   1. Competent to a very large extent.
   2. Competent to a reasonable extent.
   3. Competent to a small extent.
   4. Not competent at all.
   5. Not part of his job.

   PLEASE ANSWER ALL ITEMS:
   a. Keeping good pricing practices.  
   b. Calculating pricing.  
   c. Calculating stock turnover.  
   d. Processing customer claims.  
   e. Handling returns of merchandise.  
   f. Ensuring job descriptions are in place for all personnel.  
   g. Using four-step method of training personnel on the job.  
   h. Identifying key criteria in financial statement.

6. We are interested in finding out how applicable the following tasks are to participant's job. Please use the following code (numbers) to indicate your answer in the space opposite each item.

   1. This definitely applies to participant's job at the present time.
   2. This applies somewhat to his/her present job.
   3. This is a minor part of his/her job.
   4. This does not apply to his/her present job.

   PLEASE ANSWER ALL ITEMS:
   a. Keeping good pricing practices.  
   b. Calculating pricing.  
   c. Calculating stock turnover.  
   d. Processing customer claims.  
   e. Handling returns of merchandise.  
   f. Ensuring job descriptions are in place for all personnel.  
   g. Using four-step method of training personnel on the job.  
   h. Identifying key criteria in a financial statement.
7. From your observation of the participant, are there any benefits that the participant seems to have obtained as a result of his participation in this course? Please check as many benefits as apply.
   a. Participant learned skills which he/she is using on the job. 29
   b. Participant got promoted or reclassified. 30
   c. Participant got a pay increase. 31
   d. Participant has more self-confidence in doing his job. 32
   e. I, his boss, have more confidence in him/her now. 33
   f. Other (please specify) ________________________________ 34

8. What do you perceive are the important factors that has kept the participant from implementing on the job what he/she has learned in the program? Please use the following code (numbers) to indicate your answer in the space opposite each item.
   1. The participant had not learned adequately to be able to apply to the job.
   2. The participant's own difficulty in changing former habits.
   3. I, his boss, do not think any changes are necessary in carrying out this task.
   4. The participant is too busy on the job to implement the new learning.
   5. It is not part of participant's job.
   6. The participant has had no difficulty in implementing this learning.
   7. Other (please specify) ________________________________

PLEASE ANSWER ALL ITEMS:
   a. Keeping good pricing practices. ______ 35
   b. Calculating pricing. ______ 36
   c. Calculating stock turnover. ______ 37
   d. Processing customer claims. ______ 38
   e. Handling returns of merchandise. ______ 39
   f. Ensuring job descriptions are in place for all personnel. ______ 40
   g. Using four-step method of training personnel on the job. ______ 41
   h. Identifying key criteria in a financial statement. ______ 42

(Over)
PLEASE CHECK ONCE AGAIN TO MAKE SURE YOU HAVE ANSWERED ALL THE QUESTIONS.
If you have any other comments please use this page.
Thank you for your cooperation.
COOPERATIVE COLLEGE - SASKATOON

BASIC MANAGEMENT TRAINING PROGRAM EVALUATION

Participants' Follow-up Questionnaire

A few days ago you received a letter reminding you of the Cooperative College's intention of doing a follow-up evaluation of their Basic Management Training program in which you participated.

As you will recall, the purpose of this evaluation is to provide you with an opportunity to indicate your feelings about the course. The information you provide by answering this questionnaire will suggest ways in which the program could be revised to improve its usefulness for future participants and their organizations. The information you provided at the end of the course has already proven very useful to the Cooperative College.

The success of this project depends on you. It is very important that we get your response. Please complete this questionnaire today and mail it back to us in the envelope which is provided.

The information from this survey will be analyzed by Mrs. Izzat Jiwani, a graduate student in the Department of Continuing Education at the University of Saskatchewan.

Please be assured that the specific information which you will provide will be used in utmost confidence.

Please do not put off answering this questionnaire - we need your help and are counting on your good will.

PLEASE RETURN TO:

Mrs. Izzat Jiwani
74 Columbia Drive
SASKATOON, Saskatchewan
S7K 1E5
Basic Management Training Program

INSTRUCTIONS

For each of the following items, please use the code provided for each question. For some items, you may be asked to fill in the blank or check the appropriate item.

1. Name

2. You have now had a chance to apply what you have learned from the course in your job. How competent do you feel in carrying out some of the tasks outlined below. Please use the following code (number) to indicate your answer in the space opposite each item.

   1. Competent to a very large extent.
   2. Competent to a reasonable extent.
   3. Competent to a small extent.
   4. Not competent at all.
   5. Not part of my job.

PLEASE ANSWER ALL ITEMS:

   a. Keeping good pricing policies. ______ 4
   b. Calculating pricing. ______ 5
   c. Calculating stock turnover. ______ 6
   d. Processing claims. ______ 7
   e. Handling returns of merchandise. ______ 8
   f. Ensuring job descriptions are in place for all personnel. ______ 9
   g. Using four-step method of training personnel on the job. ______ 10
   h. Identifying key criteria in a financial statement. ______ 11

(Over)
3. We are interested in finding out how much of the course content is applicable to your present job. Please use the following code (number) to indicate your answer in the space opposite each item.

1. This definitely applies to my job.
2. This applies somewhat to my present job.
3. This is a minor part of my job.
4. This does not apply to my present job.

PLEASE ANSWER ALL ITEMS:

a. Keeping good pricing policies. ____
b. Calculating pricing. ____
c. Calculating stock turnover. ____
d. Processing claims. ____
e. Handling returns of merchandise. ____
f. Ensuring job descriptions are in place for all personnel. ____
g. Using four-step method of training personnel on the job. ____
h. Identifying key criteria in a financial statement. ____

4. Please indicate any benefit that you perceive to have received in your job because of your participation in this course. Check as many items as apply.

a. I learned skills which I am using on my job. ____
b. I was reclassified or was promoted. ____
c. I got a pay increase. ____
d. I have more self-confidence in doing my job now. ____
e. My boss has more confidence in me now. ____
f. Other (please specify) _____________________________ ____

5. Please refer to the previous question (Question 4) and indicate the single most important benefit that you perceive to have received in your job because of your participation in this course.

Benefit number ____
6. How much support have you had on the job from your superiors, co-workers and your subordinates to help you implement the learning from this course. Please use the following code (number) to indicate your answer in the space opposite each item.

1. A lot of support.
2. Reasonable support.
3. Not sure.
4. Little support.
5. No support.

PLEASE ANSWER ALL ITEMS:

a. Support from your superior.

b. Support from your co-workers.

c. Support from your subordinates.

7. What do you perceive to be the most important factor that may have kept you from implementing on the job several aspects of this course? Please use the following code (number) to indicate your answers in the space opposite each item.

1. I had not learned adequately to be able to apply to the job.
2. My own difficulty in changing former habits.
3. I did not get enough encouragement or assistance from my superiors.
4. I am too busy on the job to implement the new learning.
5. It is not part of my job.
6. I have had no difficulty in implementing this learning.
7. Other (please specify) _______________________

PLEASE ANSWER ALL ITEMS:

a. Keeping good pricing practices.

b. Calculating pricing.

c. Processing customer claims.

d. Calculating stock turnover.

e. Handling returns of merchandise.

f. Ensuring job descriptions are in place for all personnel.

g. Using four-step method of training personnel on the job.

h. Identifying key criteria in a financial statement.
PLEASE CHECK ONCE AGAIN TO MAKE SURE YOU HAVE ANSWERED ALL THE QUESTIONS. If you have any other comments, please use this page.

Thank you for your cooperation.
MEMO TO: Supervisors of Participants in Course #125 Basic Management, Conducted February and March, 1981

FROM: H. Bruno Neufeldt, Co-ordinator, Educational Program Delivery

We are doing a research project to determine the practicality of the above mentioned course to the participants and the organizations they represent.

Our research project consists of three parts:
1. A comprehensive end-of-course evaluation by the participants.
2. An evaluation by the participants three months after completion of the course.
3. An evaluation by the participants' supervisor regarding on-the-job application of concepts dealt with.

Your role in this research project is in the third part. Feedback from the participants' supervisor is very essential to validate the research.

We have contracted with Ms. Izzat Jiwani, a graduate student with the Department of Continuing Education, to conduct this research for us. She will be mailing a questionnaire to you in the latter part of April. All you will need to complete the questionnaire is your knowledge of the job situation, and of the employee who participated in the course. The analysis of the questionnaires will be done by Ms. Jiwani at the University of Saskatchewan and information will be kept strictly confidential. We will receive the outcome of this research project. I will be pleased to send you a copy of the report upon your request.

We are counting on the feedback from you and each participant to ensure the success of this research project.

Thanks for your support.

HBN: pjl
May 19, 1981

Dear Mr./Ms.

This is a reminder for you to mail the follow-up questionnaire for evaluating the Co-operative College's Basic Management Training Program.

I would like to re-emphasize that your response to this questionnaire is crucial for the success of this project. We at the Co-operative College are counting on your goodwill and are certain that you will not let us down.

Please complete the questionnaire and mail it back to us today. It would only require a few minutes of your time.

If the questionnaire needs to be replaced, please contact the Co-operative College at 373-0474.

On behalf of the Co-operative College, I would like to thank you in anticipation for your support of this project.

Yours sincerely,

IZZAT JIWANI
Department of Continuing Education
University of Saskatchewan
Saskatoon, Saskatchewan
S7N OW0
Table 25

Mean and Standard Deviations for Participants' End-of-the Course and Follow-up Ratings on Three Variables

\[ N = 35 \]

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