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EVALUATION OF PROGRAMS A MODEL: EMPLOYEE/WORKPLACE SERVICES

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ABSTRACT

A publication from the incentive travel industry on return on investments was used as a secondary source and was analyzed to provide information that may be useful to the employee service/workplace service industry. This publication provided a framework for the development of a conceptual basis to provide a mechanism for thinking about return on investment, especially on intangible benefits. There is a great similarity between incentive travel industry and employee

services/workplace services. This similarity provided a new way to think about assessment and the development of a new model that focuses upon a way to approach how intangible benefits can be used to justify and change programs.

KEY WORDS: incentive travel industry, assessment of intangible benefits, return on investment, assessment of employee service/workplace services, Blake/Mouton model.

INTRODUCTION

The Blake/Mouton model is being used. This is a distinction between assessment based upon the organization and the individual needs. This does not suggest that there is not a close correlation between these two assessments, but the information has different applications. These applications represent a much different perspective. One is from the top down and the other is from the bottom up. The other issue has been raised is that of a cooperative effort for both the achievement of organizational as well as individual goals and objectives. The achievements of both of these are needed to affect the functional relationships and achieve maximum effectiveness and efficiency. This also points to the fact if there is disparage between these two perspectives there is this a disfunctionality and neither of the organizational or the individual goals and objectives are achieved.

The assessment process directly depends upon the type of organization and its requirements. The overview of the organization is data for the justification to internal and external audiences and to make changes in the programs. This involves some type of summative and formative evaluation. This can take a variety of forms depending upon how the information will be used. Many times the information is collected and there is never an effective use of the information. This often is a direct result of not having the system for the interpretation of results that has practical application to the particular organization. There needs to be a sound theoretical system behind the type of assessment used. This will help develop a meaningful interpretation that will have practical meaning and can serve as a baseline. This theoretical component of this assessment is to develop consistency in the interpretation. This will provide an approach for the identification of significant variables and how these factors changed through time. The basic theory will not change but the variables and their application may have a different approach as situation or environmental circumstances change.

This is where the understanding of basic theory is important. Each organization can operate on a different model as long as there is consistency between theory, methods, measurement, analysis, interpretation, and application. It is important that it be recognized that a contingency approach to the operation of a system is important. Most of the time problem with data and its effective use is that there is not the consistency between theory and application. Many times different audiences ask about the methods use and the meaning of the data. This cannot be explained effectively because there is not a thorough understanding of the data in terms of the consistency. As a result, credibility is lost and the data does not have an intuitive meaning. Often, the data is couched in such a statistical form that the average individual is not have an understanding. In addition to the consistency, there must be a way to simplify the data for all audiences involved. This simplicity has to be in a form that addresses all of the issues in the consistency. Sometimes the system is so simple that it has no in-depth meaning and is not address the data in terms of common sense solutions.

Another important issue is the type of data. If the data, is a hard form/tangible such as dollars it is very easy to understand and manipulate. If it is in an intangible form, this is another whole dimension that complicates data analysis and use. This is where theory is even more important and the understanding of a model on some type of intuitive level. It is very important in developing the system dealing an intangible measures that relationships can be identified with specific outcomes. There is an element of latency and not completely understanding these relationships. Many times the path of the influence goes through several variables and is the result of many different influences. This complicates the analysis and theory becomes very important because it can help sort out spuriously affects.

Employee service/work place profession primary concern has been a focus on programs. Since the inception of an organization, there was a questionnaire that was developed about activities and their relation to the organization. This questionnaire that was developed in the 1940s was distributed to members and the information accumulated and analyzed. (Sample Appendix A) The nature of the assessment was basically on the nature of activities from an interest and performance perspective. This evaluation was completed by the Foundation of the organization. This process continued up through the modern era. There was an additional assessment process that was related to trying to define outcomes such as productivity, job satisfaction, etc., but these studies were quite diverse and varied.

MODEL

An interesting model that deals with return on investment or justification arises from the Incentive Travel Industry. It provides an overview from a hard as well as a soft perspective in terms of calculating summative aspects of assessment.

Joppe, M. and Martin, D. (Collaboration Shaw, D.) 2001 On Investment of Incentive Travel Programs, Determining the Return on Investment of Incentive Travel Programs, the Incentive Research Foundation, New York, New York.

One of the first elements of justification is defining return on investment in terms of dollars. The measure often used is that of percentage increase or decrease from a baseline number. This baseline is usually established and comparisons made on a season, a quarter, or a year. Time is the essential element and the amount of the increase or decrease is viewed in terms of success. An investment is made and it is the return on the investment that is important. There are also statistical methods often used based upon important variables and their influence on the success rate. It is a prediction process that has future implications. Another method is a ratio between the numerator which is reflected in terms of the dollar outcomes of the investment and the denominator which is the investment. This gives a relative indication of the importance of the investment in terms of a ratio. There are also indirect influences of the number of times the investment flows through the economy. These are indirect revenues that are result of the initial investment. The number of times that the dollar turns over is often studied in terms of the influences in a system, but often it is an estimate and does not reflect the true times the dollar turns over. This is often where justification numbers are inflated and presents a real problem. The return on the investment is a result of the primary dollars generated or the result of the primary dollars plus indirect income.

ROI= Net Direct Income/Investment or Net Direct and Indirect income/Investment

Employee/work place services like incentive travel have direct revenue, but often it is very difficult to determine these revenues and their impacts. Many times the outcomes from the investment are intangible and have a delayed effect upon about the dollar outcomes or the

influence upon the organization. The following is a grid that may help understand the types of outcomes or assessments. It is a classification system to help conceptualize the manuscript.

	Type of Benefits	
	Hard	Soft
Nature of Contact	\$	Non \$
	Tangible	Intangible
Direct	Increase Sales	Customer Satisfaction
Attributable	Income Invested/Returns	Employee Satisfaction
	Increased Market Share	
	Sponsor Income/Direct	
	Program Fees	
In Direct	Retention of	loyalty
Non Attributable	Customers or Employees	Image
	Sponsor Income/Indirect	

Pg. 7 (Modified Model)

It is recognized that there is a relationship among direct/attributional hard, dollar, tangible outcomes. These are the basis of most return on investments. They are very easily recognized and manipulated. An example of these is increase sales and market share.

There is a relationship between direct/attributional soft, non-dollar, and intangible outcomes. These are outcomes that are not readily recognizable and still are a benefit through secondary

variables that are often disguised. They may even be intervening variables. An example is customer and employee satisfaction.

The last part of the grid is a reflection of the path of the variables identified. In the first category, indirect/non attributable hard variables the path is clear. In the second category, indirect/non attributable soft variables the relationships among variables is not straight line, but dynamic. There can be a variety of the interactions among these variables. An example of the first category indirect hard elements is retention of customers and employees. An example of the indirect soft attributes is loyalty and image.

When the return on investment is not based upon hard outcomes, other means have to be found to justify investment. One of the ways to achieve an understanding about return on investment is to establish performance objectives and obtain measures to determine how well these objectives have been achieved, especially ones that influence the organization. There needs to be considerable research based upon the types of outcomes that are achieved from the investment. These outcomes must be stated in measurable terms. Too often, these objectives are vaguely stated and there is not a way to gage their direct influence. This does not suggest that these types of outcomes are not important. Both types of outcomes must be stated so that have a discernible outcome, especially in terms of some measure such as frequency. These types of variables must also be understood in terms of their impacts as well as their intervention in achieving various conditions and environments that are positivity related to the performance of the organization. These intangible outcomes are very diverse and complex. Many times they may be the causal factors that influence the performance of the organization. Even if there are tangible outcomes, these intangible factors must be well understood because of their impacts and influences.

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Examples:

Objective:

Hard

Increase productivity/percent increase in number of unit's produced/extra dollars generated

Increase in profits/percent increase in dollars generated/ extra dollars generated

Increase in productivity/establish objectives and compare objectives achieved in terms of percent increase of productivity at the end of established period/extra dollars generated

Soft

Increase employee satisfaction/measure employee satisfaction before and after program change

Increase employee morale/measure employee morale before and after program change

Increase in productivity/establish objectives and compare objectives achieved at the end of established period

There must be a systematic way of establishing the objectives and outcomes for intangible assessment. This is usually accomplished through the survey of relevant audiences about the impacts and influences. Often the list of objectives and impacts are factor analyze to determine their multicollinearity. This is an indication about relationships and the establishment of the dimensions within the list of objectives/impacts/outcomes (Items/Attributes). Often, there are other analyses that help establish the relationships among the factors identified and the paths and the influence of one series of variables on the other.

Once these objectives/impacts/outcomes (Items/Attributes) have been established a format must be developed to operationalize the evaluation process. One of the methods used in the incentive travel industry and has a potential to be used in employee/work place services is importance-performance grid. This is where the Items/Attributes are listed and a scale for the evaluation of the importance of that factor in achieving outcomes. There is also a corresponding scale for determining the level of performance of the Items/Attributes. Once the assessment instrument has been developed the results can be constructed on a graph with one axis that has a high and low importance and another axis that has a high and low performance. A representation can be developed for specific items as to their importance and contribution to certain outcomes in relation to the performance of the organization being assessed. Through this method, an organization can identify the Items/Attributes that have a high priority and a high performance within the organization. It can determine at what level or influence particular Items/Attributes has upon the organization. When this information is baselined, it will help establish a performance level for now as well as the future. These can be prioritized in terms of the goals and objectives of the organization.

Once this analysis is completed a new format can be developed in which the performance levels can be prioritize and rated in terms of its applicability, whether it is a short or long term impact, and whether it is a primary or secondary influence. This Items/Attributes evaluation tool helps evaluate specific objectives and their impacts to certain administrative functions. Priorities can then be established on a short or long-term basis. This information can be transferred into a format for development of return on investment. Such a template will have with program measures, corporate goals and objectives, performance, and program impact. These can be compared on a cost basis to determine if there impact is worth it to the organization. The most important part of this type of assessment is benchmarking so that comparisons can be made on a time framework.

METHOD

Pg. 24-29

The publication uses a 10 step method but this is been modified to reflect the employee/workplace service approach. The methodology used in the publication was modified to reflect a different way of approaching the types of data. Two separate calculations are being suggested to reflect the difference between tangible and intangible outcomes. The one element that is not incorporated into the intangible assessment is a type of path analysis that would allow for examining the relationships among the various variables isolated that influence the organization.

Publication Method

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Original evaluation tool.

1: Review the attributes

- 2: *Review corporate goals*
- 3: *Identify all potential incentive program goals*
- 4: *Divide all potential 'yes' attributes into 'short-' and 'long-term' goals*
- 5: *Assign a priority rating to all applicable short-term goals*
- 6: *Prioritize short-term primary goals from most to least important*
- 7: *Identify and show specific pre-program objectives in real terms*
- 8: *Calculate and reflect actual results*
- 9: *Calculate the 'Program Impact'*
- 10: *Calculate the ROI*

Modified Method

Modify Items/Attributes evaluation tool. These are essentially steps that allow for the calculation of return on investment. Modified from publication.

1 Items/Attributes must be defined and organized by themes consistent with corporate goals and objectives. (Through the use of intuitive or statistical methods)

Theme

Item Compatible (3) Partially Compatible (2) limited (1)

2 Corporate goals and objectives have to be reviewed and prioritize based upon their affect. (Time Frame)

Theme

Item Long-term (3) Short-term (2) Limited (1)

3 Corporate goals and objectives have to be reviewed based upon their impact and influence

Theme

Item Dominant (3) Limited (2) Inferior (1)

Summary:

Theme

		Compatibility	Affect	Impact
Item	Score	1-3	1-3	1-3

4 An important/performance assessment of the themes and items. Development of a 5 or a 10 point priority scale. A five point scale is preferred : Strongly agree (5) Somewhat agree (4) Neither agree nor disagree (3) Somewhat disagree (2) Strongly disagree (1) A score of 1 to 3 is low priority and score of 4 to 5 is high priority on the importance scale. A score of 1 to 3 is low performance and score of 4 to 5 is high performance.

5 Prioritize using the scoring system and transfer the items into the template chart with the highest priority to be worked on.

Select items to be worked on and develop plan to improve score or maintain.

Theme	Compatibility	Affect	Impact	Importance	Performance
Item	1 -3	1-3	1-3	1-5	1-5

Example chart

Graph scores on I/P chart with a different graph for each Theme and Item or aggregate raw scores in the chart.

	C	A	I	I/P	
Scores of	1	1	1	4-5	1-3 Needs Attention, High Priority, Weakness, Address Quickly
	1	1	1	4-5	4-5 Needs to Review, Doing well, Watch, and Sustain
	3	3	3	1-3	1-3 Needs attention, Low Priority, Weakness, Address Long term
	1	1	1	1-3	4-5 Not Important, Doing Well, Prioritize resources away

A path analysis may be completed to determine the soft variables and the effect of the chain of event to product results that have a positive effect upon the organization. An interesting approach is social auditing.

6. Translate results into action plan based upon strategies to achieve organizational goals and objectives/ outcomes.

Train on weakness and sustain strengths

Weakness	Theme	Item	Results/Performance	Impact/How to improve
Strength	Theme	Item	Results/Performance	Impact/How to sustain

7. Calculate return on investment in terms of hard and soft scores. This is reflective of program impact.

Hard Benefits Money

Dollars Generated from Program/Direct and Indirect Revenues/Dollars Invested

Ratio

Soft Benefits Objectives Achieved

High Priority/High I/P Score

Objectives Achieved/Stated Objectives

Ratio

Low Priority/Low I/P Score

Objectives Achieved/Stated Objective

Ratio

SUMMARY

Method/quantitative

The cornerstone of this method is the development of importance-performance grid. The process begins by developing objectives/statements from professionals about a topic like incentive travel. These objectives can be theoretically categorized intuitively or can be statistically grouped by development of a theme through factor analysis.

Each item could be rated or was rated on a 5 point or 10 point scale. 5 or 10 strongly agree with the object of your statement and 1 strongly disagreeing.

Analysis that a company completed an importance and the performance ratings by theme and item.

A factor analysis could be completed and factors established from the analysis of individuals who had completed a survey on the objectives.

Eigenvalues could be used to rate the importance of each of the objectives or items to the each factor.

Another method is a t-test could be used to do the significance between the groups.

A correlation coefficient could be used also to compare one item with the other items to determine the strength of relationships and further identify the relationship between the objectives for the development of a theme.

The development of this matrix is the starting point for analysis of the return on investment.

Method/qualitative

Another method being suggested involves a qualitative approach to the data. As long as the items are hard in terms of their expression, especially in dollars this is a very acceptable method. The real problem becomes with the soft items and their expression. An interesting comparison can be done on an annual basis on the basis of scores annually. Each item can be compared to the previous year's item in terms of both its importance and performance. A baseline analysis for that item can be used to determine the change from one time period to another. When these grids are compared it can be determined how the organization has changed and how it should be changed based upon the shifting of importance and performancescores.

The other aspect in terms of analysis among the soft items is the beginning of some type of social auditing process to determine the path of these variables in relation to the customer and employees and how these soft items are related one to another to produce a positive impact on the organization. Once some type of path analysis is completed, and then a ratio can be calculated between objectives specified and objectives achieved. This will give an indication of the effectiveness of the organization, not in terms of dollars but in terms of the impact of these soft variables. Many times the soft variables will turn into very positive impacts for the organization and have some type of dollar value.

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Appendix A

NATIONAL INDUSTRIAL RECREATION SURVEY

Directed by

THE PURDUE RESEARCH FOUNDATION
Through the Personnel Service
The Schools of Engineering and Science
The Division of Physical Education for Men

INSTRUCTIONS: Please check and return questionnaire in self-addressed envelope to Purdue University. Please answer this questionnaire, as it refers to the program of Industrial Recreation in your specific branch or unit of the company.

I. COMPANY _____ TYPE _____
(e.g. Electrical, Automotive, Glass, etc.)

ADDRESS _____
Street City State

PERSON GIVING INFORMATION _____
Name Title

II. Number of employees Male Female
Factory workers
Office workers
Executives
TOTAL EMPLOYEES

III. Do your employees have a recreational program? Yes No
Do you sponsor it? (Financially)
Do you direct it? (Leadership)
Or, do your employees control it?

IV. Describe the present form of administration of the recreational program. (Check the description which most nearly corresponds to your set-up.)

Administered by:

- Director of recreation
- Personnel officer
- Company officer
- Appointed committee of employees
- Group of volunteer employees
- Trade union
- Committee of both employers and employees
- Privately-supported agency (Y. M. C. A., etc.)
- Tax-supported agency (city, school, park, etc.)
- Others (specify)