



Reaching the Implementation Finish Line: Follow-Up is Key

By Debra Christopher, M.S.

My exercise of choice is running. Recently, I struggled with a running-related injury that required the services of a physical therapist. During our first session, my therapist, Bob, diagnosed the problem and showed (rather than told) me, through a series of lifts and stretches, how weak my right leg was compared to my left. I had no idea. He then prescribed a set of three exercises that I was to do twice daily. In that first session, he modeled each exercise for me and then asked me to practice each as he observed and corrected as needed. I was provided written directions for each exercise and he made sure I understood that he would be checking my skill level

when I returned a week later. I must admit, this assignment and knowing I would be “checked,” created a little pressure and mild anxiety. I was surprised and comforted, though, when two days later I received a phone call from Bob, who asked how I was doing and if the exercises were going well. A week later, during my second appointment, he watched as I performed each exercise and checked to make sure I was doing them correctly. He then added three more exercises to my regimen. He modeled, I practiced. Throughout the next few weeks, he checked in, I exercised, and my leg grew stronger.

RMC’s recommendation for embedding a follow-up support plan into any professional development process is based primarily on the research published first in 1987, and then updated in 2002, by Bruce Joyce and Beverly Showers. Joyce and Showers suggest that there are four critical training components that trainers must include in the training design if transfer of skill is the goal. Those components include 1) the exploration of the theory or rationale for the skill or strategy being taught, 2) the demonstration or modeling of the skill or strategy, 3) practice of the skill under simulated conditions, and 4) coaching. This fourth component is defined as “the collaborative work of [learners] to solve the problems or questions that arise during implementation” (Joyce & Showers, 2002b). This component occurs after the training event when participants return to the workplace. It is at this stage when the expected change occurs or . . . falls apart. Researchers found that only with the addition of this fourth component does significant transfer (executive implementation) occur.

Asking training participants to learn a new skill means asking participants to change. As Bruce Joyce notes, change is technically simple and socially complex. Therefore, the people we are asking to change will require ample time to practice the new skill and an avenue for receiving responses to their questions and concerns about implementation long after the initial training event.

I was struck by how closely this successful experience reflects the training strategies we professional developers are now promoting so strongly. My physical therapist used all of the research-based steps recommended to ensure the transfer of skill; most notably he used the techniques for effective follow-up support. And I watched those techniques work before my very eyes!

Asking training participants to learn a new skill means asking participants to change.

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We at RMC agree that follow-up support is the most neglected component of the professional development process, not only by health educators but by educators in general. This is probably true because, until recently, follow-up support has not been emphasized adequately as a key component in the professional development process. Further, it requires increased commitment, pre-planning, time, energy and, depending on the magnitude of change, increased funds. That said, without a well designed training agenda, and one that includes a comprehensive follow-up support plan, a very small percentage of training participants will successfully implement the skills being taught. Without follow-up, expect little, if any, change.

Here are some suggestions for planning and implementing a follow-up support plan that is embedded in the professional development process.

Before the training event

Any successful training event begins with a set of achievable learner objectives. These objectives provide the foundation for deciding on a sound follow-up approach. Ask these questions: What are we expecting our participants to know and do as a result of this training? More specifically, what outcome(s) are we looking to achieve: knowledge change, attitude change, skill development, or skill transfer? What degree of change might need to occur? How will we, and they, measure success? What resources do we have to provide follow-up? What might be the best follow-up technique(s) to use with these individuals for these objectives?

Communicating with participants prior to the event is a critical next step. It is important to let them know the training objectives as well as what will be expected of them post training. Share information about the follow-up support strategies that will be used. If you are using a follow-up approach that requires technology (email communication, Web bulletin board, etc.), this is the time to check to see if

participants have access to the technology required and the skill to use it. For more advice on using technology as a vehicle for providing follow-up, see the article in this issue of the *RMC Health Educator*.

During the training event

It is always important for trainers to state the intended training objectives and/or expectations at the beginning of a training event. This is why we are here and this is the result we expect. Given the objectives, again share the follow-up support approach you plan to use to reach the proposed outcome(s). Participants can then become partners in building their own follow-up plan. They do this by keeping a log of the changes they wish to take on and a timeline for the changes. We suggest that an action planning process be part of every training event and that participants be given time throughout the event to record what they plan to do as a result of what they learned, by when they plan to do it, what barriers they might encounter, and what resources they might need. The action plan should be promoted as a living document and one on which the trainer(s) will follow up. Through a pre- and post-assessment, trainers can diagnose any potential problem areas and make sure the supports and resources are in place should participants need help in these areas.

After the training event

Our plea to all professional developers: do what you said you would do. Successful learning and follow-through is partially dependant on the participants' level of trust for the "teacher." Following up as you said you would, even if it is an email note, continues to build that trust. Bob's follow-up phone calls to me and his attention to what he said he expected of me caused me to trust his ongoing advice. He kept his word and that boosted my confidence in what he was prescribing. Trainers need to provide reassurance, an avenue for questions or concerns, flexibility in participant-imposed deadlines (on the action plan timeline), and support with pressure. As Guskey (1994) suggests, *support* allows

participants to tolerate the anxiety caused by change while *pressure* is necessary to provide a level of accountability, prompting the motivation to change. Do what you can to boost confidence.

My friend and colleague (and RMC's president), Mary Doyen, has also had to call upon the services of a physical therapist after recent knee surgery. One day, as we were sharing our PT stories and comparing notes, she shared that in her recent visits her PT provided new and more sophisticated equipment resulting in a harder—and a little more painful—workout. Her response: I *like* going through this workout because I can *feel* myself getting stronger. Similarly, professional developers can assess when it is appropriate to push their training participants a little harder, increasing the pressure but still supporting the learner. Teaching participants to pay attention to and share their metacognition (thinking about their thinking) as they implement will lead to a stronger skill set. Guskey (1994) suggests that providing this kind of increased support and pressure is the key to sustaining change over the long term.

An important point to note is that checking in (following up) by adding more information does not fit our definition of follow-up support. Rather, we are suggesting that the intent of follow-up is to *reinforce* what has already been taught and hopefully learned. As Pat Roy (2005) explains, follow-up is a time for trainers to reinforce the critical attributes of the new practice and for participants to self-reflect on their performance. Adding new information at this point can muddy the waters and create "overwhelm" which could potentially cause the participant to abandon the new practice.

A common question we are asked by our constituents is "for how long do we need to provide follow-up support to our training participants?" There is no one answer to the question. It depends. It depends on the complexity of the skill being taught, the intensity of change being expected, and the learner's pre-existing skill level.

Figure 1

Trainers will have to assess each of these and base the quantity of follow-up support accordingly.

Figure 1 outlines some common ingredients that lead to successful implementation, with aligned implications for professional development design and delivery.

There are a variety of follow-up support strategies that professional developers may consider. Figure 2 lists several options, organized by cost and time intensity. Note that on the left-hand side of the chart, a follow-up strategy as simple as a note sent to the participant after the training event, costing as little as a few minutes and a postage stamp if being mailed, will provide some level of support with pressure. It serves as a reminder, a nudge, to the participant that you care to know how they are doing. When Bob called me shortly after my first appointment, I felt this same pressure and support. It caused me to stay on course and know that someone out there cared and had the expectation that I would follow through on my commitment. On the other side of the chart are the more costly and time-intensive techniques, the ultimate being on-site peer coaching. For those fortunate enough to have the staff time and funding available, this is the purest and most powerful follow-up approach for successful implementation. Joyce & Showers have shown that, when combined with the three other critical training components (theory/rationale, demonstration and practice), one can expect 95% of training participants to practice consistent implementation when adequate peer coaching is provided (2002b).

Other considerations for professional developers:

Other considerations for professional developers:

Ingredients for Success	Implication for Professional Development Process
Participants leave the training event with the confidence (and curiosity) to at least try the new skill or innovation.	Deliver a training design that allows <i>adequate time</i> for the critical training components: discussion of theory/rationale, demonstration, and practice of the new innovation with an expectation that participants will gain enough confidence to at least give the new skill a try. For example, we suggest a minimum of two days for curriculum training.
Participants have a social network—an avenue for gaining a response to questions, ideas, and concerns.	Provide a follow-up support process that is embedded in training design, allowing participants to construct a process for self-reflection and then share insights. Assign a learning buddy, learning group, or coach/mentor.
Participants are given ample time post-training to practice, self-reflect and refine the skill, preferably with support from peers.	Provide a follow-up support process that allows time between check-ins. Make sure, during the training, that participants understand that the early stages of implementation will probably feel awkward and unrefined. Urge participants to expect the awkwardness, know it is a normal stage in the change process, and stay the course.
Adequate balance of support and pressure.	State expectations before and during the training event, letting participants know you will be checking in. Ask for a commitment (actions and timeline) from them during the event that is shared in writing. Follow through. Provide support and encouragement.

Expect resistance

It is human nature to resist change. Hard as it is to accept, professional developers will become less frustrated when they understand and expect this truth. Horsley and Kaser (1999) suggest that responses to a new skill or innovation depend on how the proposed change affects what they call the four C's: "our levels of *comfort* with this new thing, our *confidence* that we can in fact do it, our sense of *competence* with existing skills and knowledge, and our sense of *control*." Clearly, as stated earlier, our training design and delivery can address, at least to some degree, the four C's. Horsley and Kaser's strong suggestion to us as we contemplate dealing with resistance, "Expect it, respect it and respond."

Less is more

"Less is more" is one of the suggestions that is most difficult for our constituents to accept. Recently, one of my training participants had a strong negative and heartfelt response when we discussed cutting back the number of training participants invited to her organization's sponsored event in order to allow more time and energy for follow-up support. Her issue, and rightfully so, was the importance of reaching as many constituents as possible with valuable information. While this is a legitimate concern, training too many participants in too short a time span does not allow the trainer(s) to build as close a relationship, diagnose potential problems, or have the energy and time to adequately conduct follow-up support. To her credit, she tried this "undesirable" ap-

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proach and shared with me after the training how much more valuable it was to have fewer participants in the room. She also shared that now, gearing up to implement the follow-up support plan isn't nearly as daunting as when their organization had invited twice the number of participants to attend. She reported that her team's follow-up support efforts, after that large event, had died a slow death. This was partly due to the lack of pre-planning and partly due to limited staff time that could be devoted to such a large number of participants. With this new group of participants the trainers have a solid

follow-up support plan, buy-in from participants, and a growing partnership with each participant. With limited resources, think about doing fewer trainings for fewer participants while increasing the level of follow-up support. You will be amazed at the results.

“Less is more” also applies to the amount of content or the degree of change expected. Most of the constituents with whom we health educators work are in positions with multiple duties; providing training is only one task on a list of many. Therefore, we must be careful that what we are expecting in terms of change and implementation of new innovations is within

reason. Bob practiced “less is more” with me when he assigned only three exercises the first go round, then three more a week later when he knew that I had mastered the first three. It would have been much more difficult for me (and my body) to master all six in the first week.

Given what we know about how human beings learn and the necessary ingredients for change, we professional developers are obligated to plan and provide effective follow-up support practices. Professional development must be seen as an ongoing process and not merely an event. Without Bob's initial diagnosis and prescribed strat-

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Figure 2: Professional Development (PD) Follow-Up Support –Strategy Continuum–

This continuum represents a variety of follow-up options and provides a rough estimate of cost and time expenditure. The continuum was created with the assumption that the service (PD) provider is an outside consultant/source. Cost and time will, of course, depend on distance from training participants, travel and equipment costs, etc.

Low Cost
Minimal Time

High Cost
Time Intensive



Email or mail reminders/motivators—send at intervals after PD event, including action plan reminders	Establish learning partners (or groups) during training - build peer support system with assigned intervals for communication post-training	Audio-conferencing	Booster Sessions <ul style="list-style-type: none"> • On-site • Distance (web-based or videoconference) 	On-site coaching and mentoring with individual teachers
<i>Letter to Myself</i> —generated at end of training—facilitator collects and sends 3-6 months after	Ongoing email discussion group/message boards—Non-moderated	Telephone follow-up	Technical assistance site visits	On-site teacher/participant observations with feedback
Participants fill out simple follow-up request form during training. Facilitator conducts email follow-up.	Newsletters	On-line moderated discussion groups/message boards	Teacher walk-throughs	Critical friends groups/Teacher support groups <ul style="list-style-type: none"> • On-site • Distance (web-based or phone/videoconference)
	E-survey			Advanced training

egies, followed by his persistent support with a little pressure built in, I would not have recovered as quickly or to the same degree. His follow-up support caused me to take him seriously and partner with him so I could get stronger. Without his thoughtful plan I would have either given up or looked for another source for help, and our interactions would have been a waste of my time and resources and his. Fortunately, he gets it.

And so it goes, the provision of effective follow-up support practices in teaching a new innovation can move participants from an uncomfortable hobble to a healthy stride.

Reader reflections

- What do you believe are the major implications of this suggested approach for your work?
- To what degree are you using a follow-up approach with your constituents?
- Based on this information, how would you change your current training design process?
- Are there follow-up strategies that you have used that have been particularly successful?
- Which of the follow-up strategies do you believe would work best for your work?

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RMC Staff

303.239.6976 + extension

Teri Baugh, Administrative Coordinator
ext. 111
terib@rmc.org

Damon Brandt, IT Manager
ext. 122
damonb@rmc.org

Debra Christopher, Project Director
ext. 103
debrac@rmc.org

Tessa Crume, Evaluator
ext. 133
tessac@rmc.org

Amy Dillon, Health Education
Consultant
ext. 127
amyd@rmc.org

Mary A. Doyen, President/CEO
ext. 112
maryd@rmc.org

Donna K. Duffy, Vice President
ext.107
donnad@rmc.org

Jill Elnicki, Evaluator
ext. 102
jille@rmc.org

Carolyn Horcher, Administrative
Coordinator
ext. 100
carolynh@rmc.org

James Hurley, Health Education
Consultant
ext. 126
jamesh@rmc.org

Taralyn Jensen-Jones, Coordinated
School Health Consultant
ext. 106
taralynj@rmc.org

Kristy Jones, Health Education
Consultant
ext. 104
kristyj@rmc.org

Keith Korth, Business Manager
ext. 120
keithk@rmc.org

Patricia A. Lauer, Evaluation Director
ext. 105
patl@rmc.org

Dan Lawrence, Project Director
ext. 113
danl@rmc.org

Wendy Larsen, Administrative
Coordinator
ext. 118
wendyl@rmc.org

Coreen Maas, Library Assistant
ext. 115
coreenm@rmc.org

Anne Milliken, Resource Specialist
ext. 109
annem@rmc.org

Paula Roseboom, Training Coordinator
ext. 119
paular@rmc.org

Laurie Schneider, Project Director
ext. 116
lauries@rmc.org

Cindy Struck, Health Education
Consultant
ext. 123
cindys@rmc.org

Sheryl Tafoya, Resource Assistant
ext. 121
sherylt@rmc.org

David Turner, Publications Manager
ext. 117
davidt@rmc.org

Rebecca Van Buhler, Evaluator
ext. 101
beckyvb@rmc.org

Tracy Wright, Health Education
Consultant
ext. 110
tracyw@rmc.org

Using Technology to Conduct Follow-up Support

by Tracy Wright, M.A. and Kristy Jones, M.S.

So you want to use technology to provide follow-up support to your training participants? It all boils down to choosing the right tool for the job. Here are some key points to ponder when considering the use of technology.

First, consider your follow-up support goal(s). What is the purpose for following up with your participants? You may have more than one follow-up support goal and each goal may require a different approach and tool. Some possible goals include:

- Continue building skills,
- Motivate the participants to take action,
- Check whether participants are implementing what they learned, and/or
- Provide additional information.

The next step is to assess the needs and technology capabilities of the participants. This includes assessing participants' skills, knowledge, and available technology resources. This may be done by:

- Conducting a needs assessment or capability assessment prior to the event, or
- Questioning participants during the event.

In addition to assessing the participants' needs and capabilities, you must assess your own. What is your knowledge and skill level, and what technology resources do you have available? How comfortable are you in using the various technology resources?

Other important items to think about, that will affect your technology

tool choice, include the number of participants expected, the cost of the tool, the amount of time during the training event to teach participants to use the tool, and the timeline for implementing the follow-up support plan.

After considering all of the above and choosing your technology tool, be sure to plan the approach for monitoring the effectiveness of your follow-up support efforts. This can be done through surveys (online or pencil-paper), interviews, focus groups, and/or by observing group interactions and level of participation.

Using technology can be tricky, but it can increase your ability to efficiently provide follow-up support if you choose the right tools and monitor your efforts.

Some great resources for using technology:

Carliner, S. (2002). *Designing e-Learning*. Alexandria, VA: ASTD Press.

Clark, R. & Mayer, R. (2003). *e-Learning and the science of instruction*. San Francisco, CA: John Wiley & Sons.

Horton, W. (2001). *Evaluating e-Learning*. Alexandria, VA: ASTD Press.

Technology tools

Indicated in the list below are some examples of technology tools that may be used to provide follow-up support to training participants.

Email Groups:

Sites where users can create and participate in discussions. This works by broadcasting emails from members to all other

members. If a member responds to an email, all members receive the response and can reply to it.

eSurveys:

Sites where users can set up and launch simple surveys. Once the survey is created, a unique URL is generated that is then sent to potential survey participants.

eMessage Boards:

Sites where users can create and participate in discussions about specific topics. These are modeled after real-world bulletin boards where a person might post (pin up) a message and others might respond by posting another message.

Instant Messaging (IM):

A way to send a quick text message to anyone who is on your IM list. Some programs have voice and video capabilities.

Audioconferencing:

Two-way voice communication between two or more individuals or groups who are in separate locations linked by a telecommunications medium (telephone, computer, etc.).

Videoconferencing:

Two-way voice and video between two or more individuals or groups who are in separate locations linked by a telecommunications medium (from simple computer cameras to elaborate television systems, etc.).

Web or Net Conferencing:

Two-way communication that uses the World Wide Web to send text, audio, and/or video between two or more individuals or groups who are in separate locations.



RMC and Alaska Partnership Continues

RMC and the Alaska Department of Health, Tobacco Prevention and Control Program have had a strong partnership for several years. During the 2006-07 school year, RMC provided training, resources and technical assistance to Alaska's K-12 Comprehensive School Tobacco Grantees. RMC has recently been awarded a professional services contract to expand this work during the 2007-08 school year.

During this school year, RMC will plan and implement a Spring Grantee Training in Anchorage, assist with planning and implementing the Fall School Wellness Institute, and provide ongoing training and technical assistance to the state staff and grantees.

The Alaska K-12 grantees are utilizing the Coordinated School Health (CSH) model to address tobacco and other health issues in schools. Several resources developed at RMC are being utilized in Alaska, including Colorado's *Roadmap to Healthy Schools*, the *Tobacco-Free Schools Policy Checklist*, and the *Pinch of Truth: Spit Tobacco Lessons and Resource Kit for Schools*. These resources provide a springboard for Alaska schools, all the while recognizing the need to make adaptations to address Alaska's unique challenges and opportunities.

This partnership is mutually beneficial! RMC continues to learn from Alaska schools about effective strategies to work with geographically isolated and diverse communities. We look forward to another year of collaboration and partnership.



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A Change in the Helm at RMC

After almost 20 years at RMC, Mary Doyen, RMC's President, has decided to retire in 2008. While it's difficult to imagine RMC without Mary, we are in the process of looking forward. A transition team, comprised of RMC staff and board members, is creating and implementing a transition plan. We anticipate that the job description for the new President will be posted on the RMC website in late January. More details will come in the spring newsletter!

The Distinction Between Follow-up and Evaluation

by Becky Van Buhler, M.A.

Follow-up support and evaluation are two essential practices of effective professional development. Within the context of professional development, they share several core aspects. First, neither practice should be a one-time occurrence. Follow-up support and evaluation are ongoing practices and should be planned systematically, that is, in a “thoughtful, intentional, and purposeful process.” (p. 42, Guskey, 2000). Second, both follow-up support and evaluation take into account all levels of an organization, from the leadership to teachers to students. Guskey emphasizes that professional development should be a systemic process. Not only should it be planned, implemented, and evaluated at different levels; but the goals of the PD program, specifically the expected changes over time and the long-term effects, need to be considered. Pulling these key concepts together, follow-up support and evaluation can occur at different levels of an organization and at different time periods, and take into account the objective(s) of the professional development program.

Since follow-up support and evaluation are similar in some aspects (as described above), the terminology used to describe these two practices is often confused; however, the definitions are, in fact, very distinct. (See chart, “The Distinctions”, on the following page.) Follow-up support refers to providing a targeted strategy or set of strategies after a professional development event in an effort to reinforce new learning and strengthen the transfer of learning. For professional development to lead to positive results, follow-up support should be planned before the professional development event and given as much priority as the initial event. Tom Guskey states, “follow-up assistance during the time when teachers are adapting their practices to fit the new ideas, and adapting the new ideas to fit their unique

situation, is critically important.” (Guskey, 1998, p. 2). Building on that premise, the magnitude and frequency of follow-up support must be determined by the degree of change expected for participants in professional development.

On the other hand, evaluation, in the context of professional development, is the systematic collection of information about the activities, characteristics and outcomes of a professional development program. This information can then be used to support judgments about the program’s impact on teachers, the organization, and students, and to help make decisions for future professional development. As programs face more demands for accountability, professional development programs need to be evaluated to improve the quality of the professional development and to assess effectiveness.

Traditionally, there are three major types of evaluation, including planning, formative, and summative. However, Guskey determined that in order for effective and useful evaluations of professional development to occur, more specific levels needed to be specified. Guskey’s (2000) model identifies five levels of professional development evaluation.

Level I – Participants’ reactions. Measures participant initial satisfaction with the professional development. Results are used to improve program design and delivery.

Level II – Participants’ learning. Measures new knowledge, skills, and attitudes. Results are used to improve program content.

Level III – Organizational support and change. Measures organization support for skills and knowledge from professional development. Results are used to docu-

ment and improve organizational support and to improve future professional development efforts.

Level IV – Participants’ use of new knowledge and skills. Measures degree and quality of learning transfer and implementation of new knowledge and skills. Results are used to document and improve implementation of what was learned from professional development.

Level V – Student learning outcomes. Measures student achievement, attitudes, and skills. Results are used to demonstrate the overall impact of professional development and improve professional development design, implementation, and follow up.

Professional development evaluation is most often conducted at Level I, primarily because it is the easiest to conduct. However, if increased professional growth and improved successful implementation are the intended outcomes, Level I evaluation is not adequate and higher levels of evaluation are highly recommended. As with follow-up support, knowing what you want to accomplish with your professional development program will help you to plan effective evaluation by identifying the evidence you need.

Understanding these distinctions, knowing your training outcomes and pre-planning for both follow-up and evaluation will go far to ensuring success with your professional development programs.

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The Distinctions

	Follow-Up	Evaluation
Relationship to PD:	Essential component of effective professional development.	Essential component of effective professional development.
Definition:	Providing or implementing a targeted strategy or set of strategies after a learning event in an effort to reinforce new learning.	Systematic collection of information about the activities, characteristics, and outcomes of a professional development program.
Purpose:	To strengthen transfer of learning.	To assess and make judgments related to: <ul style="list-style-type: none"> • Program effectiveness, • Decision-making, and/or • Future programming.
Timeline:	Ongoing over time. Strategies may change as participant skill and need changes.	Pre-determined checkpoints before, during, and/or after a learning event. May include one or more of the following: <ul style="list-style-type: none"> • Pre-event assessment • Post-event assessment • Process check during event • Post/Post event assessment
Best when:	Planned in advance of the delivery of the learning event.	Planned in advance of the delivery of the learning event.

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Colorado Department of Human Services
Alcohol and Drug Abuse Division (ADAD)

Colorado Department of Public Health and Environment
STEPS to a Healthier US (Colorado)
State Tobacco Education and Prevention Partnership (STEPP)

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