Keystone Development

# Evaluating Training Programmes

## Introduction

As training budgets appear to be under constant review, the number of learning options grows, and an increasing number of trainers in the marketplace, the issue of evaluation gains a higher profile. Increasingly, clients want to know that by investing their money in a training solution provided by a trainer, they will get real results, and value for money.

Naturally, we all believe that our approach demonstrates a unique and cost effective solution, but we rarely are able to 'prove' this. Many clients do not feel the need to evaluate formally, and this is perfectly acceptable. However, by discussing proper evaluation at the very start of the project specification, the professional trainer puts the issue right at the heart of things and makes the client really think about what they are hoping to achieve. It also demonstrates that you have faith in your solutions.

This document revisits the Kirkpatrick Model of Evaluation with a view to:

- ▲ Identifying how you already evaluate in your training solutions
- ▲ Suggesting ways that you can be more robust in our evaluation at each of the four levels
- ▲ Identifying different ways of evaluating trainer-led, and distance learning/coaching programmes.

By raising the profile of evaluation, and actively encouraging your clients to engage in it, you can:

- ▲ Raise your own profile by having more success stories to share
- ▲ Increase your earnings from clients by including the evaluation work as part of the initial project outline
- ▲ Help your clients to get their budgets approved (or increased) as they can demonstrate value for money
- ▲ Stimulate add-on work as a result of being able to provide hard evidence that training has succeeded
- ▲ Further differentiate yourself from your competitors

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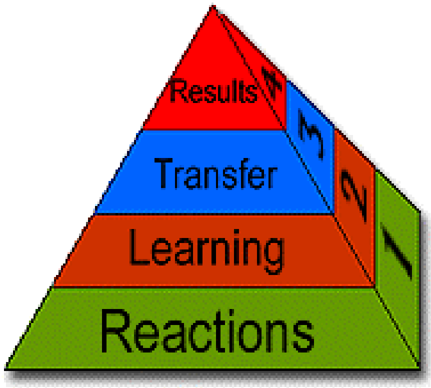
# Practical Application of Kirkpatrick’s Model

The Kirkpatrick Model is well-known, and identifies four levels of outcomes on which a training programme may be evaluated:




It is generally accepted that the higher the level, the harder it is to evaluate with confidence as the effects of training become integrated with other factors such as changed working practices, targets, job roles, business objectives, competitor activity, quality etc.

Details about the four levels, and what they mean on a practical level are provided in the next few pages.

## Level 1 – Reaction Level

Just as the word implies, evaluation at this level measures how participants in a training programme react to it. It attempts to answer questions regarding the participants' perceptions - Did they like it? Was the material relevant to their work? This type of evaluation is often called a “happy sheet.” According to Kirkpatrick, every programme should at least be evaluated at this level to provide for the continuous improvement of a training programme.

Although not considered the most important level of evaluation from a business perspective, evaluating reaction has a high level of face validity. It focuses of what people felt about the training (live or other), and it follows that if people found the experience enjoyable, they are more likely to reflect on and apply it.

However, it has to be borne in mind that delegates often complete evaluation forms quickly at the end of a training session, just before they leave, so may not put a lot of thought into them. In addition, as they are returned to the trainer following live events, delegates may be reluctant to make negative comments.

**Practical Methods of Measuring this Level**

- Course Evaluation Forms – ‘Happy Sheets’ completed immediately and returned to the trainer
- On-line or Postal Questionnaires completed shortly after the training
- Face to Face or Telephone Interviews completed shortly after the training
- Training requests made by others as a result of good feedback from delegates attending the course/completing the learning
- Referrals

## Level 2 – Learning Level

Assessing at this level moves the evaluation beyond learner satisfaction and attempts to assess the extent students have advanced in skills, knowledge, or attitude. Measurement at this level is more difficult than level one, particularly if the learning is highly personal. Methods range from formal to informal testing to team assessment and self-assessment. If possible, participants are assessed before the training (pre-test) and after training (post test) to determine the amount of learning that has occurred.

**Practical Methods of Measuring this Level**

- ▲ Observed/measured activities during the learning event e.g. role-plays, simulations, mini-quizzes
- ▲ Pre and Post training tests
- ▲ Achievement of academic qualifications
- ▲ Interview or discussion with manager or a third party

## Level 3 – Job Performance Level

This level measures the transfer that has occurred in learners' behaviour due to the training programme. Evaluating at this level attempts to answer the question - Are the newly acquired skills, knowledge, or attitude being used in the everyday environment of the learner?

For many trainers this level represents the truest assessment of a programme's effectiveness. However, measuring at this level is difficult as it is often impossible to predict when the change in behaviour will occur, and thus requires important decisions in terms of when to evaluate, how often to evaluate, and how to evaluate.

Usually, the purpose of a training programme is to improve people’s knowledge and skills to enable them to do their job better. In technical roles, the link between the training and job performance can generally be measured quite easily. For management roles however, where the nature of the work is less repetitive, more loosely defined and relies on the application of soft skills, the link can be more difficult to find.

The role of the line manager is crucial at this stage as the delegate must have both the opportunity and appropriate support to put their learning into practice. If these are not provided, evaluation at this level cannot be completed. This is beyond the control of the training provider.

**Practical Methods of Measuring this Level**

- ▲ Structured Observations (where clear standards of performance exist)
- ▲ Measurable improvements against a competence model
- ▲ Improvements in performance ratings linked to appraisal systems
- ▲ Achievement of competence-based qualifications such as NVQs
- ▲ Anecdotal evidence from the learner themselves, customers, colleagues or subordinates
- ▲ Structured interviews with learners and their managers to identify how learning has been applied
- ▲ Relevant quantitative data e.g. targets, response times, etc.

## Level 4 – Business Impact Level

Frequently thought of as the bottom line, this level measures the success of the programme in terms that managers and executives can understand - increased production, improved quality, decreased costs, reduced frequency of accidents, increased sales, and even higher profits.

From a business and organizational perspective, this is the overall reason for a training programme, yet level four results are not typically addressed. Determining results in financial terms is difficult to measure, and is hard to link directly with training.

**The business results required from a training programme must be agreed with stakeholders before the programme is designed.**

Many of the same measures can be used at this level as in the previous level if they are robust enough. For example, if it is agreed that the competence model relating to the role is relevant, correct, models best practice and links directly to success in the role, it is reasonable to expect that those scoring well here will be making an excellent business contribution.

**Practical Methods of Measuring this Level**

- Measurable improvements against a competence model
- Improvement in KPIs that are relevant to the content of the learning programme e.g. efficiency, sales, reduced complaints etc
- Use of a balanced scorecard before and after completion of the learning programme

## Return on Investment

Quite often, the time and effort required to determine the Return on Investment is not necessary. If training is appropriate to the needs of the delegates and it has been shown that the knowledge and skills have been applied to their role that should, in most cases, be sufficient.

Proving ROI is often quite difficult as financial benefits cannot often be isolated as easily as the costs, especially in the area of management training. In addition, much of the data required to carry out such an analysis is often sensitive. Finally, isolating the positive results due training rather than some other factors is almost impossible to do with certainty.

That is not to say that it shouldn’t be attempted if it is required!

*As Peter Honey recommended at the Trainerbase conference in March 2008, it is good to evaluate to this extent just once. I did it way back in 2000, and was delighted with the results (as was the client!).*

*Anyone interested in finding out more can contact me directly: Sheridan@keystonedevelopment.co.uk.*

# What does this mean for you and your Clients?

## Proposal/TNA

Firstly, it must be assumed that you are already engaged in a conversation with your clients about a specific a training need. It is good practice to 'sense check' the conclusions they have drawn, and ideally, to double-check their analysis yourself by conducting a training needs analysis. This will help you to identify the real training needs and ensure that you are tackling the right issues. Questions you should raise at this stage include:

▲ What are you hoping to achieve as a result of the training?

▲ How will you know it has been successful?

▲ What changes do you expect to see?

▲ What will people say about the training when it is complete?

▲ How quickly do you expect to see a change?

▲ Who has an interest in the outcome? (i.e. identify stakeholders)

▲ Can the changes be objectively measured e.g. sales figures?

▲ What mechanisms can you use for embedding the training back in the workplace? (e.g. competence models, appraisal/PDP systems, mentors, coaches etc)

▲ What other pressures/forces might affect the outputs from the learning/training event?

Note: Not all training solutions can be linked to clear, measurable objectives. If this is the case, identify what people will say, do and feel as a result of the training, and use this as your evaluation criteria.

## Design and Delivery of the Learning Solution

Design (and delivery) must always 'start with the end in mind', so that material can be designed and delivered to meet these needs. We must accept however, that as the level of evaluation moves towards business impact, the trainer has a decreasing impact on (and some may say responsibility for) what can be achieved. That said, trainers should consider the points overleaf to make evaluating at the four levels easier:

| | | |
|---|---|---|
| **Level 1**<br><br>**Reaction** | *Learners must find the training fun, easy and relevant.* | ▲ Include games and activities to liven up training<br>▲ Try to include something unique to make the training memorable<br>▲ Ensure a variety of learning methods to appeal to all learning styles<br>▲ Ensure the flow is logical<br>▲ Don't cram too much in – build in enough breaks and moments for reflection |
| **Level 2**<br><br>**Learning** | *Learners must know/be able to do something at the end of the training that they didn't/couldn't before* | ▲ Clear, action-based objectives should be written and discussed that relate directly to the ultimate outcome required<br>▲ Focus on one key outcome, and keep reinforcing it<br>▲ Follow accelerated learning principles<br>▲ Ensure there are opportunities for discussion of learners own situations/chances to work on real-life scenarios<br>▲ Build in role-plays and case studies where possible to provide delegates with the opportunity to apply learning in a safe environment. Coach and give feedback.<br>▲ Consider using an easily marked pre and post course (fun) quiz to measure learning immediately after the event |
| **Level 3**<br><br>**Job Performance** | *Learners must be able to apply their new knowledge skills in the workplace* | ▲ Include case studies and examples that are relevant to the learners role<br>▲ Provide lots of company/industry specific examples to aid transfer of learning<br>▲ Make links to competence models where they exist<br>▲ Highlight how topics can impact on procedures and standards that are relevant to the learner<br>▲ Ensure that practical action plans are drawn up at the end of the learning event |
| **Level 4**<br><br>**Business Impact** | *Learners must contribute to an overall business improvement* | ▲ Keep content focussed on the business/ultimate outcome<br>▲ Stress the importance of implementing action plans and discussing learning with managers<br>▲ Encourage delegates to set SMART objectives at the end of the event, that are linked to the business/training objective<br>▲ Explain how the learning will be followed up/supported back in the workplace |