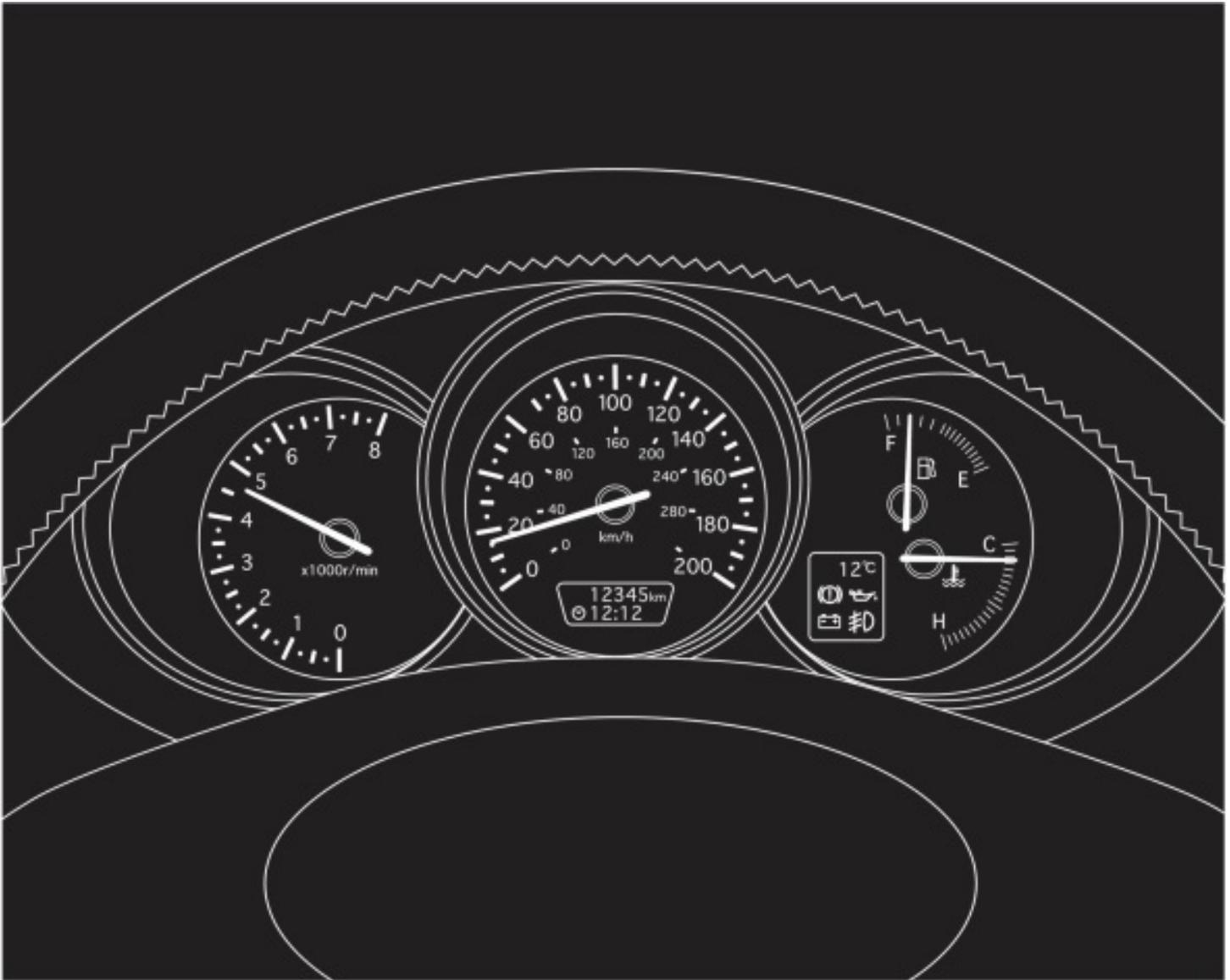


Measuring (and Driving) the Value of Training

CNLP Quarterly Meeting / December 16 2014



Bruce Winner

Los Rios CCD Government Training Academy

Email - winner@losrious.edu

Web Site - www.GetResultsFromTraining.com/GTA

Bruce blogs to the Training Community at: www.GetResultsFromTraining.com

Objectives

- * Find out the difference between a simple evaluation and truly measuring the value of training at the five generally accepted levels.
- * Discover what measures are most important to management, and how to capture that information.
- * Stop guessing about the appropriate level of measurement and see what the experts and empirical evidence reveals is optimal.
- * Explore with your colleagues how to create the systems and practices necessary (before, during, and after training), to ensure that your hard efforts result in real value, measured at an appropriate level.

ROI or Kirkpatrick Levels of Measurement

Level	Measurement Focus
0. Input	Measures input such \$ spent, people trained, \$ per trainee
1. Reaction and Relevance	Measures participant reaction to the program, did they find it relevant, and could capture planned action(s)
2. Learning	Measures changes in knowledge, skills, and attitudes
3. Application & Implementation	Measures what is applied on the job, changes in job behaviors (more of x, less of y)
4. Business Impact (Results)	Captures changes in business impact measures (Q.C.O.T)
5. ROI	Compares program benefits to program costs (simple ration or benefits minus cost / cost)

Levels of Measurement - Examples

Level 0 Input and Indicators

- Number of projects
- Audiences
- Web site hits
- Request
- Attendance
- Costs
- Time to Deliver

Level 1 Reaction and Planned Action

- Relevance
- Importance
- Usefulness
- Appeal
- Emotion
- Brevity
- Uniqueness
- Concreteness
- New Information
- Motivation
- Appropriateness
- Intent to Use

4

Levels of Measurement - Examples

Level 2 Learning and Confidence

- Information
- Knowledge
- Understanding
- Capability
- Contacts
- Confidence
- Perceptions
- Skills

Level 3 Application and Implementation

- Use of Information
- Use of Knowledge
- Use of Skill
- Completion of Actions
- Completion of Tasks
- Implementation of Ideas
- Following the Policy
- Use of Procedure
- Use of Regulation
- Success with Application
- Barriers
- Enablers

5

Levels of Measurement - Examples

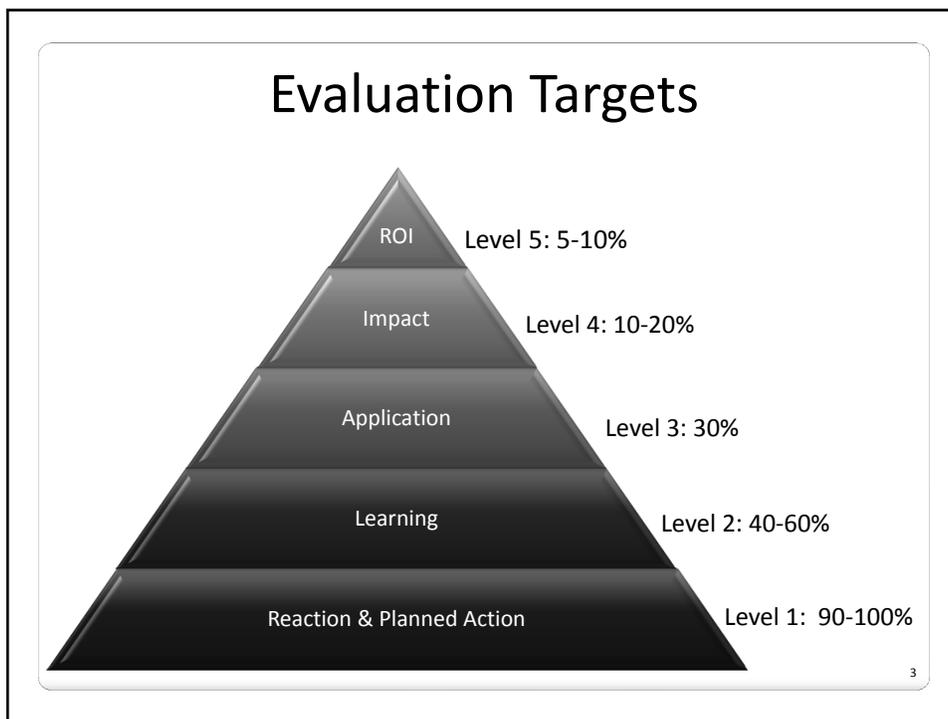
Level 4 Business Impact

- Productivity
- Quality
- Cost
- Output
- Incidents
- Time (saved)
- Efficiency
- Compliance Discrepancies
- Employee Retention

Level 5 Return on Investment

- ROI (%)
- Benefit Cost Ratio
- Payback Period

6



The Executive View of Metrics / RESULTS

Measure	We Currently Measure This	We Should Measure this in the Future	My ranking of the importance of this measure
1. <i>Inputs</i> : "Last year, 78,000 employees received formal learning."	94%		
2. <i>Efficiency</i> : "Formal learning costs \$2.15 per hour of learning consumed."	78%		
3. <i>Reaction</i> : "Employees rated our training very high, averaging 4.2 out of 5."	53%		
4. <i>Learning</i> : "92% of participants increased knowledge and skills"	32%		
5. <i>Application</i> : "At least 78% of employees are using the skills on the job"	11%		
6. <i>Impact</i> : "Our programs are driving our top 5 business measures in the organization."	8%		
7. <i>ROI</i> : "Five ROI studies were conducted on major programs yielding an average of 68% ROI."	4%		
8. <i>Awards</i> : "Our learning and development program won an award from American Society for Training and Development"	40%		

Fundamentals for Professional Trainers

Name (optional) _____

1 Reaction/Relevance

1. This course provided knowledge, skills, tools or techniques relevant to my job.



5	4	3	2	1
Strongly Agree				



2. The instructor/trainer effectively used lecture, exercises and discussion to increase my understanding of course material.



5	4	3	2	1
Strongly Agree				



3. The participant guide, handout materials, and job aids used in the course aided my understanding of the subject presented.



5	4	3	2	1
Strongly Agree				



Comments related to course relevance, trainer or materials: _____

3 Application

1. I will be able to apply the knowledge and skills learned in this course when I return to my job.



5	4	3	2	1
Strongly Agree				



2. I estimate I will use the tools or techniques learned in this course to the following extent (circle one):

None Limited Moderate Significant Very Significant

Please identify any barriers that you anticipate may hinder your ability to apply new knowledge or skills gained from this course: _____

2 Learning

My level of knowledge regarding "Training Fundamentals."

PRIOR to the series was...



5	4	3	2	1
Extensive Knowledge				
Very Little Knowledge				



AFTER the series completion was...



5	4	3	2	1
Extensive Knowledge				
Very Little Knowledge				



4 Impact

Please check any of the following impact measures that you feel will result from the application of knowledge or skills from this course:

- Improved Quality (with any aspect of ADDIE)
- Increased Trainee or Management Satisfaction
- Increased Efficiency (with any aspect of ADDIE)
- Improved Productivity (with any aspect of ADDIE)

My Course Suggestions

Suggested course additions, deletions or modifications:



Keep This! I found this useful and relevant _____



Drop This! I found this neither useful nor relevant _____

Other Comments Regarding This Course: _____

Thank You!

Exercise: Matching Evaluation Levels with Objectives

Instructions: For each objective listed below, indicate the level of evaluation at which the objective is aimed. This is more fun as a table-top exercise. Work as a group and try to match an evaluation level to EACH objective in as short a time as possible...

- | | |
|--------------------------------|-------------------------|
| 1. Reaction and Planned Action | 4. Business Impact |
| 2. Learning | 5. Return on Investment |
| 3. Application | |

Objective	Evaluation Level
After completing this program or project, participants should:	
1. Improve work group productivity by 20%	_____
2. Initiate at least three cost reduction projects in 15 days.	_____
3. Achieve an average cost reduction of \$20,000 per project.	_____
4. Use counseling discussion skills in 90% of situations where work habits are unacceptable.	_____
5. Achieve a 2:1 benefit to cost ratio one year after the new performance-management system is implemented.	_____
6. Be able to describe the four elements of the employee assistance program.	_____
7. Increase the customer satisfaction index by 25% in 3 months.	_____
8. Integrate patient records into new database following the 5-step process.	_____
9. Increase research grant funds by 20%.	_____
10. Achieve a leadership simulation score average of 75 out of a possible 100.	_____
11. Conduct a performance review meeting with direct reports in three weeks to establish performance improvement goals.	_____
12. Provide a 4 out of 5 rating on appropriateness of new ethics policy.	_____
13. Decrease the time to recruit new professional staff from 35 days to 20 days.	_____
14. Complete all action items on the action plan in 60 days.	_____
15. Perceive the flextime work schedule system as important to their success.	_____
16. Enroll in the career enhancement program with a goal of a participation rate of 15%.	_____
17. Decrease the number of security breaches of patient records.	_____
18. Achieve a post-test score increase of 30% over pre-test.	_____
19. Use the new software as reflected by an 80% score on an unscheduled audit in 3 weeks.	_____
20. Submit suggestions for improvement in the first year (with a 10% target).	_____

Some Transfer of Training Examples for an Upcoming Exercise



The Transfer of Training MATRIX

	Participant	Trainer	Supervisor / Manager
BEFORE Training		Remember our earlier example from today? ... Trainer creates objectives at <u>four or five levels... even though</u> they may NOT be measured	
DURING Training	Remember our earlier example from today? ... Participants submit new feedback via a Redesigned Level ONE Evaluation		
AFTER Training			A Supervisor Example ...Example – The supervisor works with the training participant weekly for 8 weeks after the training to make sure application takes place....

Transfer of Training - Exercise Directions

- 1) Do the exercise as a table group
- 2) Each Table has a number (1-9) that corresponds to one of nine squares on the T of T Matrix (see below)
- THEN – Use the oversized Post-IT Notes to:**
- 3) Each table creates at least one “intervention” or “means to increase transfer of training” at a specific point in time (before, during, or after) with one specific group (participants, trainers, or supervisors) - Your number 1-9 is “your box”
- 4) Then produce 1 or 2 additional interventions for ANY BOX in the matrix
- 5) Post **ONLY** two to the wall chart (one required and one extra)

	Participant	Trainer	Supervisor / Manager
BEFORE Training	1	2	3
DURING Training	4	5	6
AFTER Training	7	8	9

Resources for Measuring (and Driving) the Value of Training

ASTD Handbook for Workplace Learning Professionals 2nd Edition, Elaine Biech, ASTD Press, 2014. You'll find this compilation of works from over 90 experts and well known training professionals at www.td.org/publications. This 2nd edition handbook should be on the shelf of every training department. *Note: See Section V for a concise contemporary overview of measuring and transferring learning, including chapters on the Kirkpatrick and ROI methodologies.*

=====

ROI (Return on Investment) Methodology / Go to - www.roiinstitute.net

Beyond Learning Objectives: Develop Measurable Objectives that Link to the Bottom Line, Jack J. Phillips, ASTD Press, 2008.

The Value of Learning: How Organizations Capture Value and ROI and Translate It into Support, Improvement, and Funds, Patricia P Phillips and Jack J. Phillips, Pfeiffer, 2007

Measuring for Success: What CEOs Really Think about Learning Investments, Jack J. Phillips, ASTD Press, 2009

There are many, many more books including over 40 case study books from the public sector, coaching, leadership programs, and many more. Search amazon.com or www.td.org/publications for ROI or Jack or Patti Phillips.

=====

Kirkpatrick Four Levels of Evaluation Go to - <http://www.kirkpatrickpartners.com>

Evaluating Training Programs: The Four Levels (3rd Edition), Donald and James Kirkpatrick, Berrett-Koehler Publishers, 2006

Training on Trial: How Workplace Learning Must Reinvent Itself to Remain Relevant James D. and Wendy K. Kirkpatrick, AMACOM, 2010

=====

Transfer of Training

Transfer Of Training: Action-packed Strategies To Ensure High Payoff From Training Investment, Mary J. Broad and John. W. Newstrom, Basic Books, 1992

Making Learning Stick: 20 Easy and Effective Techniques for Training Transfer, Barbara Carnes, ASTD Press, 2010

Dr. Carnes is a contemporary writer and trainer on the topic of transfer of training. She writes an engaging blog and newsletter you can see at her website www.maketrainingstick.com. She recently published an intriguing white paper (expanded blog) entitled, "transfer of training technologies" based on using technology (3-4 web-based apps) to track training application. It is on the website and available free.

You knew there would be one last suggestion... right?

Check out Bruce's blog – www.GetResultsFromTraining.com
or visit his website - Los Rios CCD GTA at www.GetResultsFromTraining.com/GTA