

Evaluating Return on Investment of Learning

We all know that training is a must for organisations that want to keep a razor-sharp edge.

But making sure it's doing the best it possibly can and translating into observable workplace changes, is a demanding responsibility, to say the least.

So, if you need support in creating a holistic evaluation strategy that achieves the goals of your organisation, then don't hesitate to contact us now.

Our Learning & Development experts can help your HR teams create training programs that not only give you a far better return on investment, but also full workplace culture transformations.

Brands we've worked with



A Michael Mauro Resource

Evaluating ROI Primer



Evaluating Return on Investment of Learning

Designed to support Human Resources Practitioners

This document is designed to Human Resources practitioners to identify a desired direction in relation to the evaluation of learning and development interventions. It will provide:

- ✓ An introduction to a leading-practice model used in the evaluation of training
- ✓ A summary of tools and methods available to gauge learning impact
- ✓ Provide practical considerations to practitioners on the implementation of the Kirkpatrick model
- ✓ Provide example evaluation items and a sample scale to gauge participant reactions to learning

How to Use This Document

This document is intended to:

- ✓ Introduce a framework for evaluating learning and development interventions
- ✓ Provide the theoretical underpinnings for how to implement an evaluation strategy
- ✓ Translate theory into practice by presenting sample rating items for practitioners to use in their own evaluation framework

How Not to Use this Document

This document is not intended to:

- x Be used to evaluate the effectiveness of processes and programs outside of learning or training
- x Be adopted in its entirety without adjusting for factors such as the vision of an organisation, it's familiarity with evaluation and other practical constraints
- x Provide a detailed guide on evaluating training beyond the level of reaction

Ongoing Support

For further support and any queries you might have about how to take your organisation's evaluation strategy to the next level, please contact:

Michael Mauro

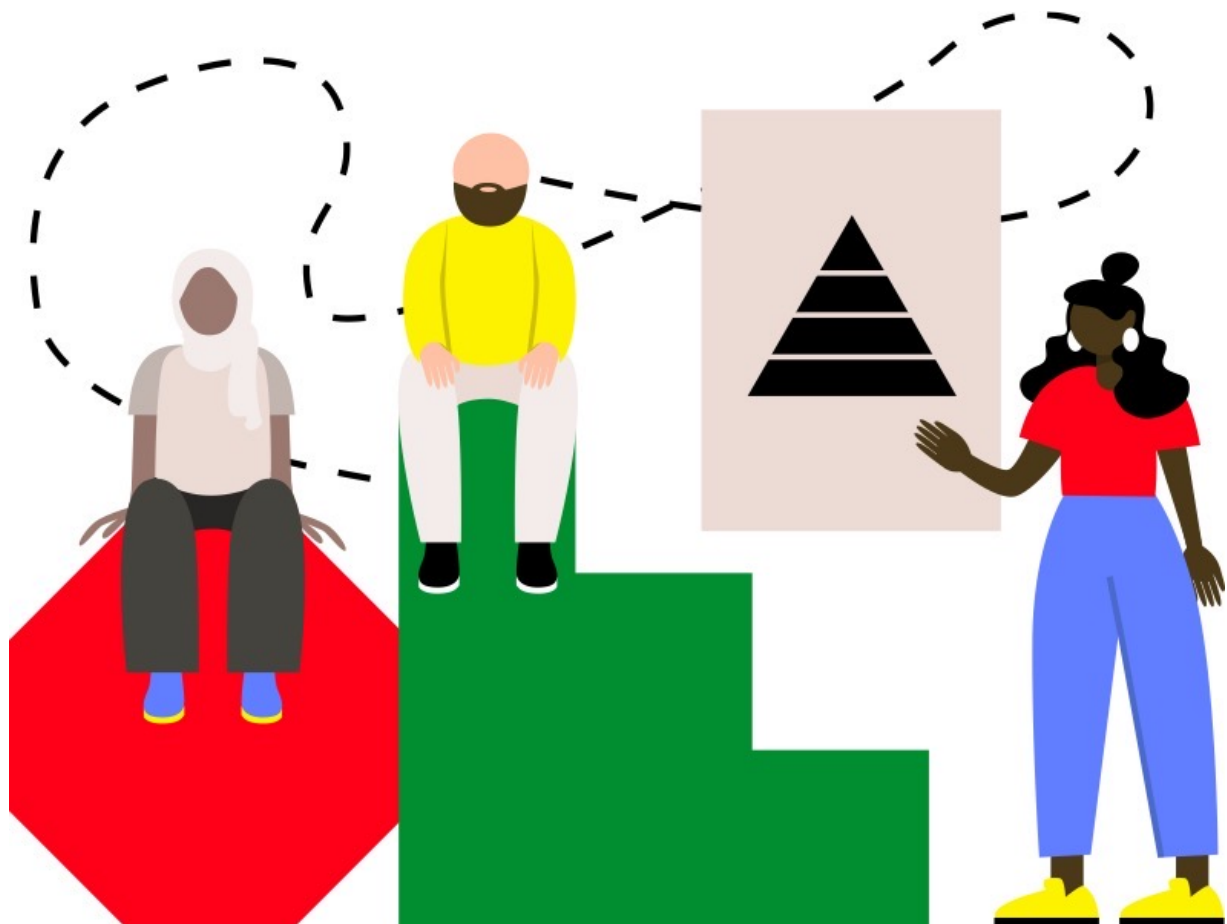
hello@michaelmauro.co.uk

www.michaelmauro.co.uk

+44 7340 695 680

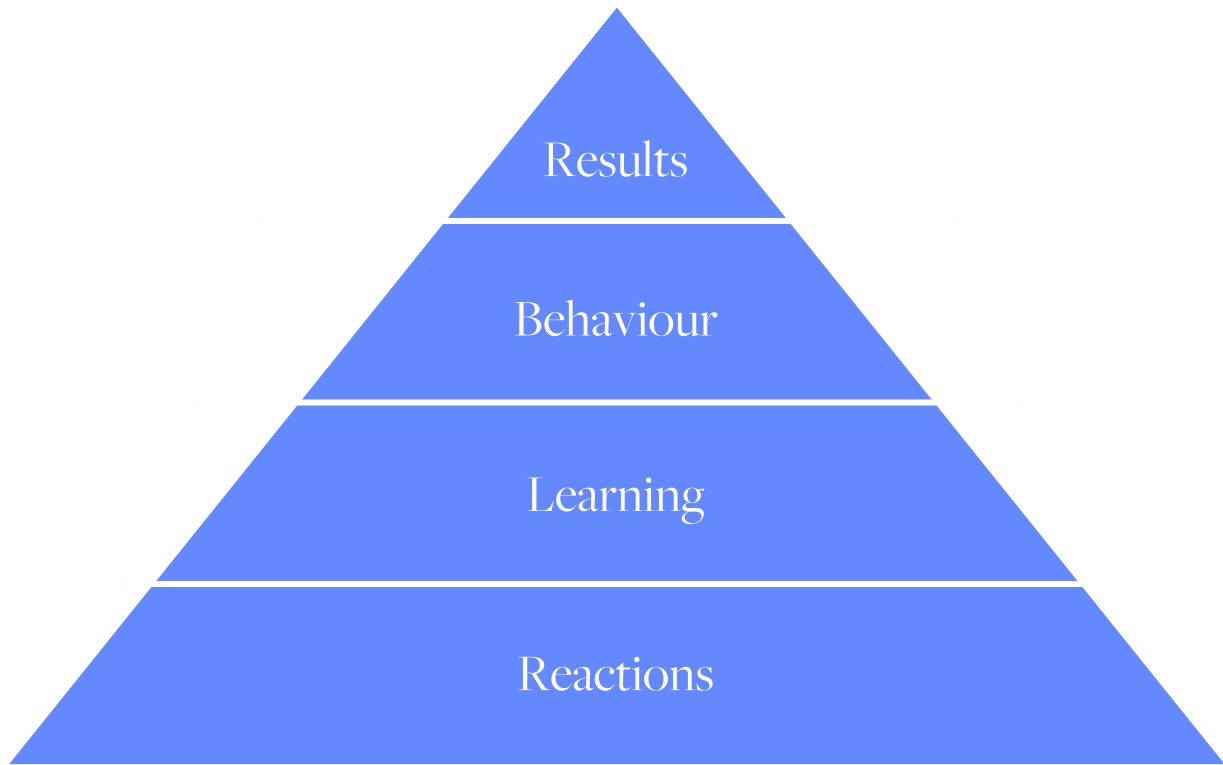
Evaluating Return on Investment of Learning: A Primer

If you're responsible for delivering high-quality training in a business environment, you'll understand the importance of measuring the effectiveness of the training you provide. Evaluation goes hand-in-hand with trying to gauge return on investment and creating business cases for additional resources. Like anything, you'll need to tailor your approach to fit the environment; however, from the perspective of learning and development initiatives, few models are as well recognized and used as the Kirkpatrick Model¹. It assists individuals in evaluating the effectiveness of training, understanding whether efforts translated into observable workplace changes. This guide is an introduction to the Kirkpatrick Model, providing a starting point for understanding how to utilise it and what potential tools or methods are available to aid you in evaluating your training efforts.



¹Kirkpatrick, D. L. (1959). Techniques for Evaluation of Training Programs. *Journal of the American Society of Training Directors*, 13, 21-26.

What is the Kirkpatrick Model?



Level	Examples of Evaluations
Level 4 – Business Impact (Results): This level determines if the improved behaviours learned and developed at level three have made an impact to the business.	<ul style="list-style-type: none">• Engagement• Promotion• Turnover• Productivity Gains
Level 3 – Behaviour: Assessments at this level involve measuring the degree to which the new learning is applied in the workplace and/or identifying changes in behaviour over a given time period.	<ul style="list-style-type: none">• Rating of behaviour (e.g. 180 OR 360-degree survey)• Self-report
Level 2 – Learning: Assessments at this level look to see if any new knowledge and skills were acquired as a result of the training program as well as successful achievement of learning objectives.	<ul style="list-style-type: none">• Knowledge tests• Understanding of a domain• Skill demonstration
Level 1 – Reaction: This level identifies how a person felt about the training program they participated in, specifically to determine if they felt if it was a positive experience.	<ul style="list-style-type: none">• Post-experience questionnaire of:<ul style="list-style-type: none">• Emotional affect• Practical value

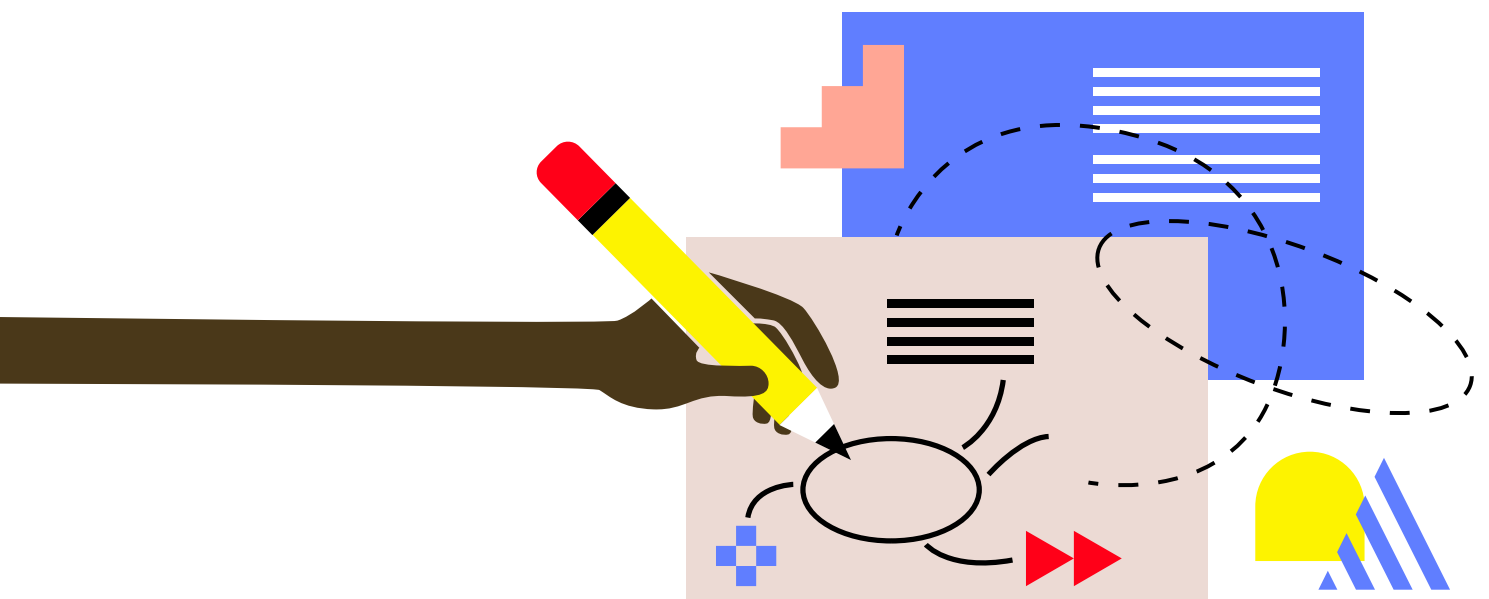
What is the Kirkpatrick Model?

Created by Donald Kirkpatrick, it is globally recognized as one of the most effective methods of evaluating training within an organization. It has been revised several times since its inception to ensure ongoing relevance and is comprised of four levels. Each level increases in complexity, time and skill required, and impact on the organisation.

By this logic, implementing evaluation at Level 1 of the model will be the simplest starting point for understanding the impact your training is having. Data from previous levels can be used as a foundation for analysis in the following level. The considerations outlined below will support you in identifying and managing potential risks depending on the approach taken. Ensure you consider the results you desire from your intervention prior to its creation and implementation. This will support you in designing an evaluation strategy that is most efficient and effective.

Do you need to evaluate your training at all four levels?

It would be a great benefit to your training program if you were able to demonstrate that the skills learned were able to change the behaviour of those in attendance and positively contribute to the organisation; however, this can be extremely challenging to implement in practice. Although a Return on Investment study may not be feasible at all times, this is something that organisations and training departments should aspire towards. Understand what barriers exist within the organisation which may prevent you from attaining the deepest levels of evaluation possible. These may come in the form of lack of / poor quality data, insufficient resources, lack of expertise, etc. Where necessary, drawing in external support can help accelerate your evaluation strategy and super-charge your efforts.



Kirkpatrick's Four Levels of Training Evaluation

Evaluation Type	Description and Characteristics	Examples of Tools and Methods	Practical Tips
LEVEL 1 Reaction	<p>This level ascertains individuals' reactions to the training or learning experience:</p> <ul style="list-style-type: none"> • Did trainees enjoy the training? • Was it a good use of their time? • Would they recommend it to others? • How did they feel about the venue, timing, logistics, facilitator, etc. 	<p>Referred to as 'happy sheets'. Feedback forms are based on personal reactions to the training. Methods of evaluation include:</p> <ul style="list-style-type: none"> • Post-training surveys / questionnaires • Online evaluation or grading by trainees • Subsequent verbal or written reports given by trainees to managers back at their jobs. 	<ul style="list-style-type: none"> • You can and should, where possible, do this evaluation immediately after the training ends • Written comments should be encouraged • You can utilise online survey platforms, such as Survey Monkey, to inexpensively gather or analyse feedback
LEVEL 2 Learning	<p>This level ascertains the increase in knowledge or capability which was achieved as a result of the learning experience:</p> <ul style="list-style-type: none"> • Did trainees learn what was intended? • Did they experience what was intended? • What is the extend of the change in trainees after the experience? In which direction? 	<p>Typically assessments or tests before and after training. Methods of evaluation include:</p> <ul style="list-style-type: none"> • Interview or observation • Questionnaire or online evaluation • Observations by peers or instructors • Exams or assessments 	<ul style="list-style-type: none"> • Relate your methods of assessment closely to the learning aims • Establish reliable, clear scoring and measurement to limit inconsistent assessment • You can utilise online survey platforms, such as Survey Monkey, to analyse data easily and inexpensively on a group scale • It is easiest to implement for training that is quantifiable or technical • It is harder to implement for training that attempts to develop 'soft skills' or attitudes • You may use a control group for comparison

Kirkpatrick's Four Levels of Training Evaluation

Evaluation Type	Description and Characteristics	Examples of Tools and Methods	Practical Tips
LEVEL 3 Behaviour	<p>This level ascertains the extent to which trainees applied the learning and changed their behaviour either immediately and / or several months after training:</p> <ul style="list-style-type: none"> • Did the trainees put their learning into effect when back on the job? • Were the relevant skills and knowledge used? • Was there noticeable or measurable change in the activity and performance of trainees? • Was the behaviour change sustained over time? • Would trainees be able to transfer their learning to another person? 	<p>Assessments of longitudinal behavioural change which require some forethought to implement. Methods of evaluation include:</p> <ul style="list-style-type: none"> • Observation / interviews over time • 360-degree feedback • 180-degree feedback • Questionnaire or online evaluation • Situational scenarios linked to key efficiency indicators 	<ul style="list-style-type: none"> • Integrate this evaluation within management and coaching protocols • You will need the support and buy-in of line managers to adequately assess this level • Line managers should be involved from the start • Make your evaluations subtle and ongoing • Where possible, attempt to reduce the subjective judgment of the trainee and rely on more objective metrics
LEVEL 4 Results	<p>This level ascertains the extent to which the training improved performance of trainees in a way that <i>impacted the business or environment</i>:</p> <ul style="list-style-type: none"> • Were business or organizational performance indicators impacted? • Did the training impact volumes, values, percentages, timescales, return on investment, turnover, complaints, attrition, failure, promotion rate, quality ratings, retention, etc. 	<p>The measures required to evaluate <i>results</i> are often already in place due to normal management systems and reporting. The difficulty lies in identifying which of these is impacted by the trainee's influence as opposed to other factors. Methods of evaluation include:</p> <ul style="list-style-type: none"> • Business metrics • Performance appraisals 	<ul style="list-style-type: none"> • Ensure you use a control group and allow enough time to measure and evaluate • Where required, enlist the support of someone with the capability to link metrics to training input • Be aware that external factors greatly affect organizational performance, which can cloud the true cause of good or poor results • Attempt how the frequency and scale of changing structures, responsibilities and roles can complicate the process of attributing clear accountability

To kick-start your evaluation efforts, we have provided example evaluation items for the first level of Kirkpatrick's model.

Example Evaluation Items: Level 1

This section provides a suggested list of items which can be used to evaluate your training program at the first level of Kirkpatrick's Model. Before using these questions, consider the outcome you're seeking. Ask yourself 'what do I want to know?' Not all questions need to be used and lengthy or frequent surveys can contribute to survey fatigue.

1. Course registration information was accurate and useful
2. I was able to easily register for the training course
3. The course materials helped me learn
4. The pace of the course was appropriate for the material
5. The delivery method was appropriate for the content and objective of the course
6. The exercises were well-suited to the delivery method
7. The exercises helped me learn valuable knowledge and skills
8. Overall, the instructor was effective
9. The instructor's presentation style was engaging
10. The instructor answered questions clearly and completely
11. Instructions for the exercises were clear
12. The exercises helped me learn knowledge and skills in a way that I could not have easily learned on the job

You may ask participants to 'rate the extent to which you agree or disagree with the following statements'. Questions are typically paired with a five point scale to allow for distinctions between ratings.

1	2	3	4	5
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

Ongoing Support

We all know that training is a must for organisations that want to keep a razor-sharp edge.

But making sure it's doing the best it possibly can and translating into observable workplace changes, is a demanding responsibility, to say the least.

So, if you need support in creating a holistic evaluation strategy that achieves the goals of your organisation, then don't hesitate to contact us now.

Our Learning & Development experts can help your HR teams create training programs that not only give you a far better return on investment, but also full workplace culture transformations.

Michael Mauro
hello@michaelmauro.co.uk
www.michaelmauro.co.uk
+44 7340 695 680

