Evaluation is not working today

- Only ¼ of respondents believe that they are “getting a solid bang” for their evaluation buck
- Kirkpatrick is most used approach, with Brinkerhoff second. But none of it happens much.
- **Five** percent of training budget is spent on evaluating, mostly gathering reactions
- Solution from the study: seek metrics that resonate for leaders

[ASTD/i4cp study, 2009]
WHERE ARE WE TODAY?

4 trends affect analysis and evaluation
1. Economic pain and upheaval 😞
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support
Economic upheaval propels the other trends

4 trends affect analysis and evaluation

1. Economic pain and upheaval
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support
Forty-two percent of organizations anticipate decreasing classroom learning.

Seventy-two percent intend to increase their asynchronous e-learning.

[Chief Learning Officer’s Business Intelligence study]

4 trends affect analysis and evaluation

1. Economic pain and upheaval
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support
What CEOs Measure

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Description</th>
<th>“of greatest concern”</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sustained and steady top-line growth</td>
<td>37.5%</td>
</tr>
<tr>
<td>2</td>
<td>Profit growth</td>
<td>36.1%</td>
</tr>
<tr>
<td>3</td>
<td>Consistent execution of strategy by top management</td>
<td>33.4%</td>
</tr>
<tr>
<td>4</td>
<td>Speed, flexibility, adaptability to change</td>
<td>33.1%</td>
</tr>
<tr>
<td>5</td>
<td>Customer loyalty / retention</td>
<td>29.4%</td>
</tr>
<tr>
<td>6</td>
<td>Stimulating innovation / creativity / enabling entrepreneurship</td>
<td>23.9%</td>
</tr>
<tr>
<td>7</td>
<td>Corporate reputation</td>
<td>22.9%</td>
</tr>
<tr>
<td>8</td>
<td>Speed to market</td>
<td>22.7%</td>
</tr>
<tr>
<td>9</td>
<td>[Product] Innovation</td>
<td>20.8%</td>
</tr>
<tr>
<td>10</td>
<td>Improving productivity</td>
<td>20.3%</td>
</tr>
</tbody>
</table>

Source: The Conference Board

What We Measure—WHEN we measure

Percentage of Courses Evaluated at Each of Kirkpatrick’s Four Levels

- Level 1 Reaction: 94%
- Level 2 Learning: 34%
- Level 3 Behavior: 13%
- Level 4 Results: 3%

It does not have to be this way.

Source: "Restructuring: Results From the ASTD Benchmarking Forum"
The casinos LOVE data

- Constant measurement against a few targets
- Use of data to anticipate needs and target services

4 trends affect analysis and evaluation

1. Economic pain and upheaval
2. Technology
3. Evidence-based decision-making
4. Workplace learning and support
Delivering support into work

- Coast Guard boarding officers must know about many vessels
- Unacceptable error rate; costly training
- Now they use a blend, a short course plus PDA to inspect and report

West Point plus ..... a blog in their dangerous “workplace”
NEW METRICS

Global study in a financial services organization

Work in progress

Kirkpatrick’s model is good. Is it sufficient? Today, we require more

Level 4: Does it strateg;

Level 3: Are they doing it (objectives) consistently and appropriately?

Level 2: Can they do it (objectives)? Do they show the skills and abilities?

Level 1: Did they like the experience? Satisfaction? Use? Repeat use?

“Allison, don’t you like Kirkpatrick’s levels?”
Workplace learning/support

More purposes

Matched methods

PURPOSES. To find out....

1. Who our people are: their strengths, needs, priorities, opportunities
2. About the quality of the fit between what we are delivering and what is required
3. Why people perform and don’t and what will increase alignment, transfer, performance
4. How satisfied people are with learning events and instructors, and on-demand and workplace based resources
To find out....

5. If we are fulfilling promises to regulators
6. If learning happened and if it transfers to work
7. If we are influencing prized strategic outcomes
8. If we are contributing to talent management, including attraction, retention and advancement of individuals
9. The tally of all that we do and how much it is worth to the organization

To find out....

10. The adequacy of guidance to employees so they are able to find what they need when they need it, to self serve their development
11. If our people are engaged with their performance and development
12. How committed our people are to the work and task and their willingness to contribute to networks, communities and goals
### Purposes in brief

<table>
<thead>
<tr>
<th>Purposes in brief</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Who our people are, their strengths, needs, priorities</td>
<td>2. Fit between what they need and what we deliver</td>
</tr>
<tr>
<td>3. Why they perform and don’t to tailor solutions and assure influence</td>
<td>4. Satisfaction with what we offer, from events to on demand resources</td>
</tr>
<tr>
<td>5. Fulfillment of regulatory and compliance obligations</td>
<td>6. Learning happens and turns into action</td>
</tr>
<tr>
<td>7. Contributions to strategic results</td>
<td>8. Talent management, including attraction, retention and career advancement</td>
</tr>
<tr>
<td>9. Tally of magnitude of our efforts and the value delivered to the organization</td>
<td>10. Guidance that enables our people to find what they need, to track progress, to select appropriate resources</td>
</tr>
<tr>
<td>11. Engagement with their own development and work</td>
<td>12. Willingness to add to community, networks, and organizational goals</td>
</tr>
</tbody>
</table>

---

You can’t tackle all the purposes.

This was a project for a mutual fund company. Two years prior they had launched an initiative to convert 45 trainers to performance consultants. Now they want to know how it’s going. What are their purposes? No, they can’t pursue all 12. No time, few resources.

1. **Who our people are, their strengths, needs, priorities?**
2. **Drivers and causes to assure alignment and transfer?**
3. **Contributions to strategic results?**

---

It’s all about conversations!
How to find out “how it was going”

I limited my purposes. What methods then?

- **Who our people are, what they most need**
  - Anonymous online survey for 45 consultants seeking their assessment of skills and knowledge associated with performance consulting. Seek confidence to perform.
  - Interview consultants about lingering questions, and barriers what they require to deliver on change in their roles.
  - Interview randomly selected customers. What did they handle well? What not so well?

- **Examine alignment by querying causes/drivers**
  - In anonymous online survey for consultants, include a question about drivers/blockers. What would help them move forward to deliver on this new role?
  - Interview consultants’ supervisors regarding what drives/blocks performance.
  - Look at the performance mgmt system. Has it changed with the new roles?
  - See Brinkerhoff SCM.

- **Determine contributions to strategic results**
  - Interview randomly selected customers. What were they seeking when they came to us? What business results? What indicators would signify success? Measure.
  - Repeat requests from customers? Better framed requirements?

Some leaders are griping about the new on-boarding program…. The EVP is worried that the current program skips over how to deliver difficult messages.

- Ten months ago you and your team rebuilt the program and shifted it online. Now some execs are griping. What to do?
- You are tasked with building something to help service reps deliver unwelcome news, like that our company isn’t going to cover the claim.

Give it a go
Use purposes to plan methods

<table>
<thead>
<tr>
<th>Purposes</th>
<th>Sources</th>
<th>Questions</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>To see if learning occurred</td>
<td>Participants, Supervisors, Customers, Records</td>
<td>How would you handle this? (assessments, tests)</td>
<td>Test scores, Error rate, Call backs, Customer sat, Speedy completion</td>
</tr>
<tr>
<td>To determine contributions to business outcomes</td>
<td>Executives, Managers, Strategy docs, See Spitzer LEM</td>
<td>What do you expect? What indicators would satisfy? Delight?</td>
<td>Error rate, Call backs, Customer sat, Speedy completion, Tailored indicators</td>
</tr>
<tr>
<td>To see if we contribute to talent management</td>
<td>Employees, Potential employees, HR, managers</td>
<td>Why did you join us? Why are you departing? How do you perceive learning offering?</td>
<td>Recruitment, Retention rate, Employee satisfaction, Engagement</td>
</tr>
<tr>
<td>To see if we advance careers of our people (talent mgmt)</td>
<td>Participants; peers, Supervisors, HR colleagues, Perf mgmt system</td>
<td>Where to from here for you? What more must you know and do? Do you know how to move forward? Resources?</td>
<td>Are career paths specified? Increase in promotions from within? Retention up?</td>
</tr>
</tbody>
</table>
• **M** More data, more sources, more often
• **A** Actionable: PLAN, REPORT, IMPROVE
• **R** Repurposing methods, data
• **B** Baked in— as you build programs
• **L** Lean, based on smaller bites of data
• **E** Everywhere learning, support & info go

“If I had eight hours to chop down a tree, I’d spend six sharpening my ax.”

~~ Abraham Lincoln
Useful links, I hope

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SDSU Encyclopedia of Educational Technology</td>
<td><a href="http://coe.sdsu.edu/eet/">http://coe.sdsu.edu/eet/</a></td>
</tr>
<tr>
<td>SDSU EDTEC graduate programs</td>
<td><a href="http://edweb.sdsu.edu/Edtec/distance/">http://edweb.sdsu.edu/Edtec/distance/</a></td>
</tr>
<tr>
<td>A social network devoted to non-training interventions</td>
<td><a href="http://www.pinotnet.ning.com">www.pinotnet.ning.com</a></td>
</tr>
<tr>
<td>Pithy video introductions to Web 2.0 strategies</td>
<td><a href="http://www.commoncraft.com/show">http://www.commoncraft.com/show</a></td>
</tr>
</tbody>
</table>

Pl follow me on twitter @arossett
Dr. Allison Rossett, long time professor of Professor of Educational Technology at San Diego State University, is in the Training magazine Hall of Fame, CLO Advisory Board, US Army’s Distance Learning Advisory Board, and Elearning Guild’s Board too. Rossett has authored six books, including a brand new edition of her classic, First Things Fast: a handbook for performance analysis. Allison writes about and consults on learning, technology and results. You can reach Allison at arossett@mail.sdsu.edu
