

# Getting the Value out of Evaluation

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# Getting the Value out of Evaluation

Evaluation has long been a thorny topic: what should you evaluate, how should you do it and what should you compare the results against?

**Kevin Lovell** from KnowledgePool highlights the dilemma and outlines a process for measuring the outcomes of learning. He also raises the issue of the need to ensure line manager support for learning

## Training activity and learning outcomes

As L&D departments make the transition from training to learning, the associated shift to being less activity focused and more outcomes focused draws the spotlight onto our approach to evaluation.

Evaluating training is something we've done for years. It's an activity focused assessment of the quantity and quality of the training that is delivered. We ask questions about the ability of the trainer, the pace of the training, the clarity of the training materials, the suitability of the venue, and so on. And although we may have introduced forward-looking questions about how much learners think they will use what they've learned, essentially it's all about the activity of training delivery.

Evaluating learning, however, is a different matter. You can't tell how much learning has occurred until some time after the training has finished. By that time the learners have returned to their workplace, back under the day to day pressures to get things done – and quickly. Only then will we find out if the skills and knowledge carefully imparted weeks ago result in improved performance.

As Ulrich and Brockbank (2005) observe, 'Value is defined by the receivers of HR work ... more than by the givers.' Evaluation of training focuses on the activity of the givers, whilst evaluating learning focuses on what the receivers have done with the training. It should be no surprise, then, that when we measure the outcomes of learning we tend to measure value, or what we often call business benefit.

## Current evaluation practice

As L&D practitioners, we know that in the vast majority of training programmes, evaluation amounts to little more than a 'reactionnaire' – also known as a happy sheet or a Kirkpatrick Level 1 (reaction) evaluation. If you doubt this, just look at the CIPD discussion on 'The Value of Learning' at [www.cipd.co.uk](http://www.cipd.co.uk). Whether you look at figures from ASTD, CIPD or the ROI Institute, all the research shows that beyond this level, evaluation tails off rapidly.

We should not dumb down reactionnaires, as they provide important information which can improve the quality of future training delivery. However we must also acknowledge that they tell us a lot about training activity but nothing about learning outcomes.

What we can also observe about reactionnaires is the high degree of consistency across the industry. True, every organisation has their own specific questions to ask, but in general they all ask the same things: about the course; the trainer's delivery skills; the supporting materials; the venue, etc.

In contrast, higher level evaluations are quite rare. Whilst some methodologies exist (such as Jack Phillips' The ROI Process™), there are no standard practices which organisations can take off-the-shelf. Consequently, any organisation wishing to measure learning outcomes has to develop their own approach.

## Barriers to evaluating learning outcomes

The CIPD's Learning and Development Annual Survey Report (2006) identifies the two main barriers to evaluation of learning outcomes as lack of resources (76%) and time (67%). Furthermore, 80% of L&D professionals believe learning delivers more value than they can demonstrate. In short we don't have the skills or the time to do it and we don't know how to demonstrate the benefits of learning effectively.

In practice, L&D teams are preoccupied with making training activity happen. Post-course tasks are limited to keying in reactionnaire data and compiling the monthly management report. The need to finalise next week's training events is far more pressing.

This lack of time, combined with the lack of resource to devise an approach for evaluating learning outcomes, conspire to form an insurmountable barrier.

## A potential standard approach?

Against this background, two years ago we began to experiment with ways of measuring learning outcomes. The key criteria were that the evaluation must be:

- quick and simple to administer,
- generic – applicable off-the-shelf to a wide range of learning interventions and
- able to deliver credible measures of transfer of learning to the workplace and of business benefit.

Our first decision was to conduct the evaluation as a questionnaire. There was an inevitable compromise here. It's impossible for a questionnaire to match a detailed evaluation using interview techniques and analysis of business metrics, nor can it measure ROI. However, a questionnaire can be used on a large scale, just as reactionnaires apply to virtually all interventions.

The next step was to devise which questions to ask. We focus on three areas:

- **Transfer of learning to the workplace.** In particular, the role of line managers in facilitating this process.
- **Business benefit.** In the form of individual performance improvement.
- **Narrative.** Learners' experiences of performance improvement in their own words.

## Transfer of learning to the workplace

Transfer of learning is a prerequisite to any kind of business benefit, hence the measurement of the extent to which this happens is a vital link in the wider learning process chain. Line managers play a crucial role in facilitating the transfer of learning to the workplace, so we also ask learners how much they feel their line manager supports them in doing so. The first two questions we ask are as follows:

1. To what extent have you had the opportunity to use what you learned, in your work?
2. To what extent has your line manager helped you to use what you learned?

## Business benefit

As the CIPD identify in their recent discussion paper *The Value of Learning*, a major problem is distinguishing those business benefits which are attributable to training from those which are not.

Our experience of evaluating learning outcomes face-to-face tells us that learners are clear about whether a particular intervention helped them do their job better. Several months after the training, they can tell you how and where it helped to improve their performance (or not, as the case may be). Asking learners how a specific training intervention has impacted their performance automatically filters out other influences.

So the questions we ask in this section measure business benefit, as indicated by individual performance improvement. They explore the extent to which the learning has impacted the learner's performance across seven generic areas. The different questions help us to see whether the learning has impacted some areas more than others.

3. How much do you feel this course has helped improve your performance at work, overall?
4. How much has this course helped you improve quality?
5. How much has this course helped you reduce costs?
6. How much has this course helped you reduce the time to complete tasks?
7. How much has this course helped you to increase sales?
8. How much has this course helped you improve customer satisfaction?
9. How much has this course helped improve employee satisfaction?

## Narrative

The joint ASTD and IBM research *C-Level and the Value of Learning* (O'Driscoll et al, 2005), compared the perceptions of Chief Learning Officers (CLOs) with that of other board executives (so-called CXOs) on the strategic value of learning. A significant finding was this: 'To more closely align with CXOs ... the survey results suggest that CLOs should balance metrics and ROI data with anecdotal evidence'.

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## Narrative, particularly the words of learners, can do a great deal to paint a picture around bare statistics

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If we are to articulate business benefit at the executive level, we must be credible: sheer numbers are not enough. Narrative, particularly the words of learners, can do a great deal to paint a picture around bare statistics. They indicate emotion, strength of feeling, and best of all they can tell stories of how learning has been used in real life, to make a difference. For this reason we include the following question which allows a free-text response.

10. Please give up to three examples where the learning has helped to improve your performance at work.

## Issuing the questionnaire

To further simplify the administration of this evaluation, these ten questions were formed into an online questionnaire and learners were invited to respond by email. Integration with the training administration system ensured email requests were issued automatically at the appropriate time. Automated reminders were sent if no response was received, to enhance response rates. Responses were collated automatically into the training administration database, from which reports were extracted.

## Results

The questionnaire was piloted across many different training courses in ten different organisations from a number of sectors: central government, customer service centres, engineering, local government, IT services, manufacturing and media. To date over 1,000 responses have been collated, at a 58% response rate.

The results were checked for reliability and consistency including, for specific courses, comparisons with reaction feedback and anecdotal comments from the relevant L&D team. Our conclusion is that the results do provide an acceptably accurate statement of what happens when learners return to work.

Specifically, the outcomes from the survey provide the following information.

### Transfer of learning to the workplace

- 70% of learners use what they learned (hence 30% don't).
- 53% believe their line manager supported them to use what they learned (but 47% say no).

Significantly, of the 53% who did get line manager support, nearly all of them applied their learning. However, of the 47% without line manager support, more than half failed to apply what they learned. Overall, 25% of learners neither applied what they have learned, nor got line manager support to do so (see Figure 1).

The picture is clear. Where line manager support exists, the transfer of learning to the workplace is much higher. From the performance questions, we also see this support translates into much greater performance improvement (see Figure 2).

This quantifies the impact of line managers on performance improvement derived from learning. If this is deemed to be an issue, HR can put interventions in place to address the problem. Using this questionnaire over a period of time, HR can monitor the impact of those interventions, both in terms of transfer of learning and in performance improvement.

### Business Benefit

The results from the seven performance improvement questions allow the givers in L&D and the receivers in the business to review their learning in new ways.

## Only by looking at outcomes data can you begin to assess the impact of learning on your business

We tend to assume that 'good training' automatically equals business benefits. That's a risky assumption. When the performance improvement scores for a course are compared with that course's reactionnaire feedback, we have found that sometimes great training has ended up in negligible performance improvement. It is perfectly possible for a roomful of learners to have a great time, in an excellent environment, with a highly knowledgeable and skilled trainer who presented the material brilliantly, yet it didn't impact performance in the workplace.

Only by looking at outcomes data can you begin to assess the impact of learning on your business. And if great training results in negligible performance improvement, you have to ask yourself why you're continuing to run it. Of course some courses are mandatory and required for compliance purposes, but most are not. Using outcomes data, you can assess your training portfolio in a new light.

Figure 1: Influence of line manager support on transfer of learning to the workplace

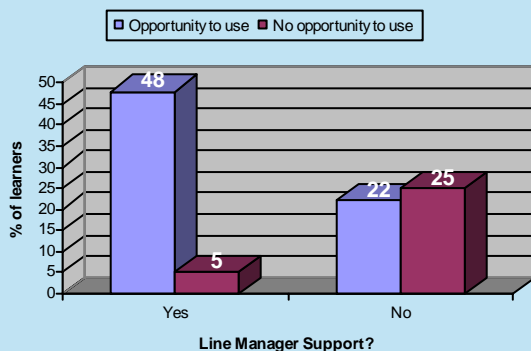
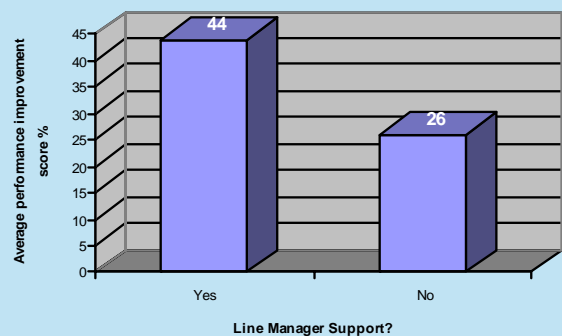


Figure 2: Effect of line manager support on performance improvement



**Benchmarking of performance improvement.** The performance improvement responses are converted into a percentage: 0% means no improvement; 100% means 'a great deal' of improvement. We have found in the results a broad consistency of response, with some variations emerging for particular courses or types of courses. By calculating an average of all the scores received for each performance improvement question, we arrived at 'national average' benchmarks (Figure 3). This allows comparisons to see how a course, series of courses, or even all of an organisation's learning measures against the benchmarks. The average performance improvement score across all seven questions was 35%.

**Identification of high and low impact courses.** From our pilot, organisations can see if their courses are leading to above average impact. Figures 4 and 5 show how results for the seven performance questions differ from the benchmark (green bars indicate scores above the benchmark level, red bars for scores below).

Figure 4 shows a Leadership course. It's performing fairly well, particularly in customer satisfaction, but slightly below average overall, in quality improvement and cost reduction. Depending on the course objectives and the target audience, this may or may not be a cause for concern.

Figure 5 shows a real high-impact sales course. It's above the benchmark on all areas and best of all it achieves a particularly high sales score. Just what you would want, this course is clearly hitting the mark.

Finally (Figure 6) this course is clearly under-performing. Interestingly, the reactionnaire feedback was good. These results prompted further investigation, which showed that while the course itself was sound, opportunities to apply this learning were sporadic. Learners needed short, just-in-time refreshers. This resulted in a redesign of the learning, to better suit the application of learning.

Figure 3: 'National average' benchmarks for performance improvement

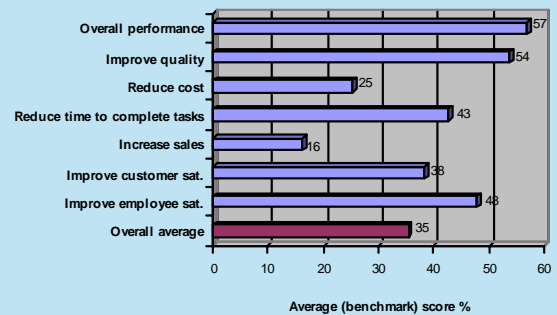


Figure 4: Leadership course performance improvement (difference from benchmarks)

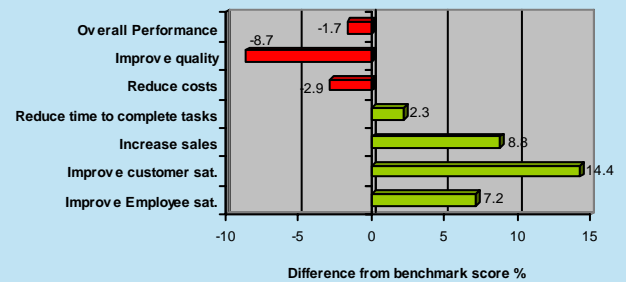


Figure 5: High impact course (difference from benchmarks)

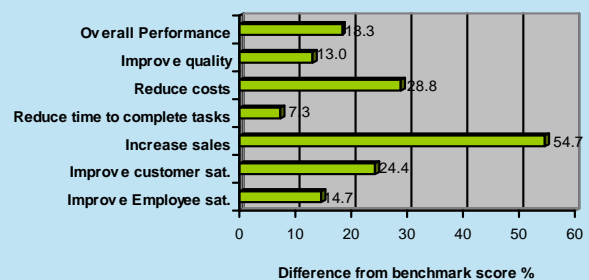
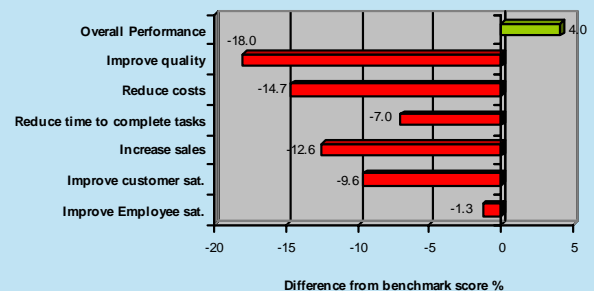


Figure 6: Low impact course (difference from benchmarks)



## Narrative

The free text response to question 10 allows for a wide range of replies. Some merely repeat the course module titles, while others give clear indication of how learners have used what they learned. Here we offer some examples, by and large they speak for themselves.

Comments may indicate the level of satisfaction a learner has with his/her improved performance:

*"I did quite well in this and was very pleased with the results" [leadership course]*

Others provide clear evidence of learning being transferred to the workplace:

*"I have adopted methods during meetings (use of agendas, time management etc) which help deal with an 'awkward' line managed employee" [leadership course]*

The best comments show real evidence of behavioural change:

*"Helped me win £xx,xxx of new business from a client who really wanted to negotiate, and was considering all other options in the market place. I wanted them on fast, I priced it high and asked them to start immediately for a discount" [sales course]*

*"The recipient of the feedback was very much against taking any advice and probably in the past I would have left things as they were, but now I feel more in control in these type of situations" [leadership course]*

Occasionally, we gain glimpses of how learning impacts whole teams, not just the learner:

*"This course has helped my transition from an advisor to a team leader. It has helped the call quality of members of my team as I have been able to make them aware of coaching issues they never thought affected their day to day job. It has also helped my call quality when I have been taking escalated calls" [coaching course]*

## Conclusion

In evolving this approach for measuring learning outcomes and reviewing the initial data, we believe we can build a meaningful account of what happens to learners after training. The focus is on transfer of learning, on the role of line managers in that process and on individual performance improvement. All three of these factors are of significant concern for L&D teams and this pilot offers benchmark statistics for each:

- 70% of learners transfer their learning to the workplace
- 53% of learners get line manager support to apply their learning (and 25% of learners neither apply their learning, nor do they get line manager support)
- The average (benchmark) performance improvement score is 35%

Clearly the results are based upon the perceptions of the learners and this should be recognised. However the results have been collected in a consistent fashion and are comparable between training interventions. A further enhancement to this approach would be to ask similar questions of the learners' line managers, for a more objective assessment.

For those wanting to monetarise the business benefits from learning, this approach will not go far enough. However it narrows the gap considerably between reactionnaires at one extreme and ROI (return on investment) at the other. In time we expect to link ROI figures with performance improvement scores. Moreover, modern training administration technology can automate the issue and collation of the questionnaire data, which opens the door for enterprise-wide measurement of learning outcomes. This would give L&D teams a much higher and broad-based platform of data against which to compare the ROI of specific training programmes. We may even be able to draw more general correlations between performance improvement scores and ROI.

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