Measurement & Evaluation—

proving impact across the enterprise

Presented by
Wes Parker

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We develop extraordinary leaders
who build healthy organizations.

services

Droste has in-house experts—Certified ROI Professionals (CRPs)—who have implemented valid, effective, and efficient measurement and evaluation from small to Fortune 500 enterprise.

We can assist your in-house team or, if you don't have any or have them but they are not available, we can do it for you.

sources of expertise

- Donald Kirkpatrick / Kirkpatrick Group
- Jack Phillips / ROI Institute

why measure?

We're in training because we want to help people to change their behavior in order to achieve the desired business results. **Both they and we want to <u>know</u> whether that is being done and how well.**

Business 101—**without measurement there is no management.** If we are leaders, we must have measurement in order to achieve even basic management—let alone meet best practices, continuously improve, etc.

measurement levels

- Trainers have always measured participant data, measured Levels 1 – 4 since the mid 1970s, and Level 5 since the early 1990s.

- **Level 0** – **Participant data**/Function/Location/Type and number of classes
- Levels 1 – 4 (Kirkpatrick)
  - **Level 1** - Participant **Reaction** to Course/Facilitator
  - **Level 2** - Amount of **Learning** – Knowledge After vs. Before Course
  - **Level 3** - On-the-Job **Application** of New Knowledge/Skills
  - **Level 4** – Business **Impact** of On-the-Job Application
- **Level 5** (Phillips) – Return-On-Investment (**ROI**) - Impact vs. Course Cost

examples of measurements

LEVEL	WHAT IS MEASURED	EXAMPLES
0	Participants	323 West Area IT employees completed the course in January
1	Participant Reaction	Participants gave the course a 4.7 (on a 1 – 5 scale with 5 being the highest)
2	Amount of Learning	Pre-Class Test Score: 18 Post-Class Test Score: 89 % of Knowledge Increase: 494%
3	On-the-Job Application	Participants used their new knowledge/skills 65% of each week.
4	Business Impact	Participants who completed the course reduced costs 12% as compared to just 1% for participants who did <u>not</u> complete the course.
5	Return-On-Investment (ROI)	For every dollar spent on this training, the company made $11.58.

why measure these levels? (1 of 2)

LEVEL	WHAT IS MEASURED	WHY IT IS MEASURED
0	**Participant data (Measured at class completion)**	**Who is using training?** If impact and ROI are lacking in a department, from level 0s we can determine **if enough participants from that department are taking the training** and correct as needed.
1	Participant **Reaction (Measured at class completion)**	**Do participants think the course and facilitator were effective?** If a course is not providing impact and ROI, from level 1s we can determine **if it is the course design or the particular facilitator** that needs improvement.
2	Amount of **Learning – (Measured at first and end of class)**	**Did participants learn anything and were the course objectives met?** If a course is not providing impact and ROI, from level 2s we can determine **if learning is taking place-**--if not, we look at the Level 1s for the cause.

NOTE: These scores can also be compared to other courses, facilitators, and participant groups to **ensure best practice** levels.

why measure these levels? (2 of 2)

LEVEL	WHAT IS MEASURED	WHY IT IS MEASURED
3	On-the-Job **Application** of New Skills **(Measured 3 months after class)**	**Did the participants' performance improve?** If the new knowledge/skills are not being applied on the job, from Levels 3 and previous levels, we can determine **if we need to improve internal/external factors** to the training (such as management support and post-training reinforcements.)
4	Business **Impact** of On-the-Job Application **(Measured 6 months after class)**	**Did the participants' performance improve the business?** Importantly, **if expected business impact is not happening**, level 4 and previous levels identify that, the causes, and any needed improvements.
5	Return-On-Investment (**ROI**) - Impact vs. Course Costs **(Completed after Level 4)**	**How much profit did we make from this training?** Importantly, **if expected ROI is not happening**, level 5and previous levels identify that, the causes, and any needed improvements.

NOTE: These scores can also be compared to other courses, facilitators, and participant groups to **ensure best practice** levels.

how much should we measure?

LEVEL	WHAT IS MEASURED	BEST PRACTICE* % OF COURSES MEASURED	TARGET % OF COURSES MEASURED
0	Participants	100%	**100%**
1	Participant Reaction	100%	**100%**
2	Amount of Learning	50%	**50%**
3	On-the-Job Application	30%	**30%**
4	Business Impact	20%	**20%**
5	Return-On-Investment (ROI)	10%	**10%**

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measurement process

1. Identify Roles
2. Create Assessments
3. Gather Data
4. Report Data
5. Estimated Timeline

1. roles

WHO	DUTIES
Leaders and Team	1. Identify: • Case study format (*recommend keeping current format for now*) • What courses will be reported (*recommend reporting all courses*) • When courses will be reported (*recommend one from each Program Manager per month until all courses have been reported*). • Who will receive case studies (*working with Communications Team*).
Admin Support	1. Pull PeopleSoft Report for Level 0 participant data (completions, etc.) upon request by a Program Manager. 2. Sends post-training emails with links to Levels 3 and 4. **NOTE**: This process could possibly be automated.
Facilitators	1. Send post-training email with links to Levels 1 and Levels 2. **NOTE**: This could be done instead by the Admin Support upon receiving completion notifications. This process could possibly be automated.
Program Managers	1. Set up course Level 1 – 4 assessments in Opinio (*most are already created; recommend one Program Manager to work with all to complete remaining)* 2. Create the case study for the month from the pulled data (from Opinio and, via the Admin Support, PeopleSoft) 3. Communicate the case study (posting, meetings, email, etc.).

2. create assessments

LEVEL/ MEASURMENT	QUESTIONS (Specific questions provided upon request.)
0 - Participant Data	Raw data from PeopleSoft
1 - Participant Reaction *(estimate the participant completes in 2 minutes)*	Class effectiveness, Facilitator effectiveness
2 - Amount of Learning *(estimate the participant completes in 5 minutes)*	10 questions about main objectives and major enabling objectives, multiple choice, four possible answers, single correct answer --- given before and after learning event
3 - On-the-Job Application *(estimate the participant completes in 2 minutes)*	Six questions determining how often new knowledge/skills are used, how effectively, which main objectives, what are barriers/supports to application and comments.
4 - Business Impact *(estimate the participant completes in 5minutes)*	Series of four screens determining what business measurements have changed, how much, how much is due solely to training, and confidence level.
5 - Return-On-Investment (ROI)	Calculation

3. gather data

LEVEL/ MEASURMENT	WHO	WHAT	WHEN
0 - Participant Data	Admin Support	Pulls PeopleSoft Report	When Program Managers need to put together a case study, they request from Admin.
1 - Participant Reaction	Facilitator	Emails assessment link to participants.	Immediately After Training Event.
2 - Amount of Learning	Facilitator	Emails assessment link to participants.	Immediately Before and After Training Event.
3 - On-the-Job Application	Admin Support	Emails assessment link to participants and leaders.	3 Months After Training Event
4 - Business Impact	Admin Support	Emails assessment link to participants.	6 Months After Training Event
5 - Return-On-Investment (ROI)	Program Manager	Calculates	When Program Managers need to put together case study.

4. report data

1. **Leaders/Team** first need to identify:
   - Case study format (*recommend keeping current format for now*)
   - What courses will be reported (*recommend reporting all courses*)
   - When courses will be reported (*recommend one from each Program Manager per month until all courses have been reported*).
   - Who will receive case studies (*working with Communications Team*)
2. **Program Managers** and **Admin Support** implement agreed upon plan—create case studies for all courses, in desired format, according to schedule, and communicate as identified.

4. estimated timelines

WHO	WHAT	ESTIMATED DURATION
Leaders/Team	Meet to identify case study format, what courses will be reported and when, and who will receive case studies. (Recommend keeping current format and report all courses. Meeting Output would be when courses will be reported and to whom.)	2 Hrs.
A Single Program Manager	Create remaining needed assessments	3 Days
Admin Support	Pull PeopleSoft Reports and send L3 and L4 assessment links to participants	Each month, 4 Hrs.
Facilitators	Send L1 and L2 assessment links to participants.	Each month, 2 Hrs.
Program Managers	Train on how to pull data and put together case study. Pull data, create and communicate case study.	Training, 4 Hrs. Each month, 4 Hrs.

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