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**Measuring Results From Training**

**Instructor Guide**



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# Preface

*Learning is a treasure that will follow its owner everywhere.*

*Chinese Proverb*

## What is Courseware?

MC900071138[1]Welcome to Corporate Training Materials, a completely new training experience!

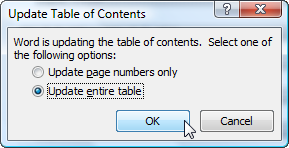
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

## How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants’ industry, or additional information. You can, of course, also use all of your word processor’s other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click “Update entire table” and press OK.

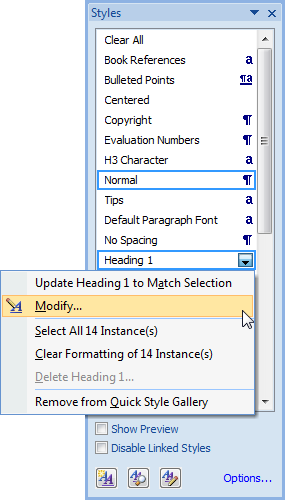


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to Word 2007 or 2010 Essentials by Corporate Training Materials.

## Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

* Laptop with projector, for PowerPoint slides
* Quick Reference Sheets for students to take home
* Timer or watch (separate from your laptop)
* Masking tape
* Blank paper

## Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

* **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
* Use examples, case studies, and stories that are relevant to the group.
* Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
* Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
* **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
* **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
* **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

# Module One: Getting Started

*Suffer now and live the rest of your life as a champion.*

*Muhammad Ali*

Welcome to the Measuring Results with Training workshop. Although we all know that training can have many amazing benefits, sometimes it can be hard to prove those benefits and attach a dollar value to training. Some topics, like sales training or time management, might have direct, tangible benefits. Other topics, like communication or leadership, might have benefits that you can’t put a dollar value on. In this course, we will learn about the different ways to evaluate training progress, and how to use those results to demonstrate the results that training brings.

## Housekeeping Items

Take a few moments to cover basic housekeeping items.

* If you need an opening or a way to introduce the participants to each other, utilize the Icebreakers folder to begin or between breaks during the day.
* Let participants know where they can find washrooms, break facilities, and fire exits.
* Ask participants to turn off their cell phones or at least turn them to vibrate. If they must take a call, request that they do it outside.
* Take this time to encourage the group to ask questions and make this an interactive workshop.
* Write the words Respect, Confidentiality, and Practice on a piece of flip chart paper and tape it to the wall. Explain to participants that in order to get the most out of this workshop, we must all work together, listen to each other, explore new ideas, and make mistakes. After all, that’s how we learn!

## The Parking Lot

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900057299[1].wmfExplain the concept of The Parking Lot to participants.

* The Parking Lot is a visible place where you will “park” ideas that arise which are not on the agenda, may be off topic, or are better addressed outside of the program.
* At the end of the session, we will review parked ideas and follow up, or make suggestions for your own investigation when you are back at work.

Suggestions for the trainer:

1. If you are working with a large group of participants, you may wish to nominate a recorder to park items as you are facilitating.
2. It’s a good idea to note the name of the contributor along with the parked item.
3. Items noted on the parking lot can be useful to you later as you plan future training sessions.

## Workshop Objectives

C:\Users\Kimmi\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\JVU559D0\MCj02934740000[1].wmfResearch has consistently demonstrated that when clear goals are associated with learning, it occurs more easily and rapidly.

By the end of this workshop, participants will:

* Understand Kolb’s learning styles and learning cycle
* Understand Kirkpatrick’s levels of evaluation
* Be familiar with many types of evaluation tools, including goal setting, tests, reactionary sheets, interviews, observations, hip-pocket assessments, skill assessments, and learning journals
* Understand when to use each type of evaluation tool
* Be able to perform a needs assessment
* Know how to write learning objectives and link them to evaluation
* Be able to write an evaluation plan to evaluate learning at each stage of the training and far beyond
* Know how to identify the costs, benefits, and return on investment of training
* Be familiar with the parts of a business case

## Pre-Assignment Review

C:\Program Files\Microsoft Office\MEDIA\CAGCAT10\j0234131.wmfThe purpose of the Pre-Assignment is to get participants thinking about the evaluation strategies that they are already using and where they need or want to improve. Participants were asked to review a list of topics and use a rating system to indicate their interest in the topic. Take a moment to review the list and highlight areas of interest.

You can find the complete pre-assignment in the activities folder.

## Action Plans and Evaluations

Pass out the participant action plans and evaluations, available in the activities folder. Ask participants to fill these out throughout the day as they learn new things and have ideas on how to incorporate the things we discuss into their lives.

# Module Two: Kolb’s Learning Styles

In order to train individuals effectively, the trainer must understand that there are four ways that an individual can learn. Although each individual has a preferred style, all four elements must be included for learning to be effective. This module will look at David Kolb’s four stage learning process and the four related styles of learning.

*What I hear, I forget.*

*What I see, I remember.*

*What I do, I understand.*

*Confucius*

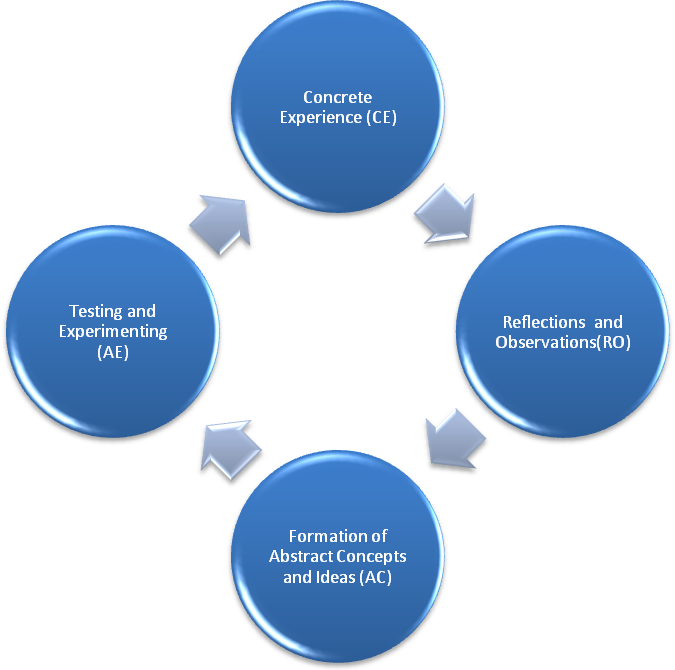
## The Four-Stage Process

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900014212[1].wmfA learner’s experience begins with Concrete Experience – things that happen to that individual. The individual then observes the situation, making Reflections and Observations. Next, the individual thinks about what has happened and develops Abstract Concepts. Finally, the individual Actively Experiments with those new ideas, leading to new Concrete Experiences – and the cycle begins all over again.

It is important to remember that this cycle occurs any time learning is required, whether it is learning how to use a new dishwasher at home, learning a new computer program, or trying to train your dog.

Now let’s look at Kolb’s four learning styles and see how they fit in with the learning cycle.

Kolb’s learning cycle looks like this:



|  |  |
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| Estimated Time | 10 minutes |
| Topic Objective | To understand Kolb’s learning cycle. |
| Topic Summary | A learner’s experience begins with Concrete Experience – things that happen to that individual. The individual then observes the situation, making Reflections and Observations. Next, the individual thinks about what has happened and develops Abstract Concepts. Finally, the individual Actively Experiments with those new ideas, leading to new Concrete Experiences – and the cycle begins all over again. |
| Materials Required | Cycle on flip chart or PowerPoint |
| Recommended Activity | Review the cycle with participants. Then, have them suggest a learning scenario and walk through each stage of the learning process.  Example: Learning a new word processing program.   * Concrete Experience: Student views a demonstration of the new program. * Reflections and Observations: Student observes that it is similar to a spreadsheet program that they use. * Formation of Abstract Concepts and Ideas: Student begins relating the new program to what he already knows. * Testing and Experimenting: Student applies this knowledge to the program. |
| Stories to Share | Kolb has developed a Learning Style Inventory that can be taken to determine what type of learning an individual prefers. |
| Delivery Tips | Here are some learning scenarios:   * Learning how to operate a new machine * Learning how to sew * Learning how to read |
| Review Questions | List the four stages of Kolb’s learning cycle. |

## Accommodators

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900370220[1].wmfAccommodators are best at concrete experience and active experimentation. These are the people that are often the first to take risks, try new things, and carry out plans. This style of learning is often found in action-oriented, problem-solving jobs, like marketing, sales, and business.

Accommodators:

* Are good with people
* Can be seen as impatient and demanding because they are so eager to solve the problem
* Adapt well to new situations
* Use trial and error, intuition, and people resources rather than logic
* Do not become attached to a particular plan and will change when required

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| Estimated Time | 5 minutes |
| Topic Objective | To understand what an accommodative learning style looks like. |
| Topic Summary | Accommodators are best at concrete experience and active experimentation. |
| Recommended Activity | Review the following scenario with participants.  A time management workshop is currently taking place. Participants have been divided into groups of six. They have been asked to review several time management tools and decide which tools seem the most promising. (Some of these tools are well-proven; others are new to the workshop.) They will then take these tools back to the workplace and test them out for a week.  How might an Accommodator behave? |
| Stories to Share | This group is named Accommodators because they can accommodate themselves to almost any situation. |
| Delivery Tips | Possible answers:   * May take charge * May prefer the newer tools * Will ask others if they have used the tools and what their experiences have been * Will form opinions at the beginning of the exercise but will adapt based on input obtained |
| Review Questions | What areas are Accommodators best at?  (Answer: Concrete experience and active experimentation) |

## Divergers

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900367816[1].wmfDivergers are best at concrete experience and reflective observation. These are the people that can view all sides of the problem and bring all information together into a cohesive picture. Divergers are often found in the arts, cultural pursuits, and humanitarian efforts.

Divergers:

* Are good at generating ideas and are useful in brainstorming sessions
* Are typically creative, imaginative, and emotional
* Are interested in people
* Are organized and logical (although not necessarily in a linear way)

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| Estimated Time | 5 minutes |
| Topic Objective | To understand what a divergent learning style looks like. |
| Topic Summary | Divergers are best at concrete experience and reflective observation. |
| Recommended Activity | Review the following scenario with participants.  A time management workshop is currently taking place. Participants have been divided into groups of six. They have been asked to review several time management tools and decide which tools seem the most promising. (Some of these tools are well-proven; others are new to the workshop.) They will then take these tools back to the workplace and test them out for a week.  How might a Diverger behave? |
| Stories to Share | This group is named Divergers because they can diversify themselves and think from various perspectives, or conversely, bring various perspectives together. |
| Delivery Tips | Possible answers:   * Will solicit input from all group members * Will encourage others to brainstorm * Will coalesce ideas into a meaningful whole * May help the group come up with new tools |
| Review Questions | What areas are Divergers best at?  (Answer: Concrete experience and reflective observation) |

## Convergers

Convergers are best at abstract conceptualization and active experimentation. This group is best at applying practical ideas. They work best in situations where there is a single correct answer to a question or situation. Convergers are often found in the physical sciences, such as engineering or biology.

Convergers:

* Organize knowledge into hypotheses to identify specific problems, and then use deductive reasoning to arrive at an answer for those problems
* Are relatively unemotional
* Prefer to deal with people rather than things
* Have narrow interests
* Do not like to move outside their comfort zone

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| Estimated Time | 5 minutes |
| Topic Objective | To understand what a convergent learning style looks like. |
| Topic Summary | Convergers are best at abstract conceptualization and active experimentation. |
| Recommended Activity | Review the following scenario with participants.  A time management workshop is currently taking place. Participants have been divided into groups of six. They have been asked to review several time management tools and decide which tools seem the most promising. (Some of these tools are well-proven; others are new to the workshop.) They will then take these tools back to the workplace and test them out for a week.  How might a Converger behave? |
| Delivery Tips | Possible answers:   * Will find this situation hard to deal with since there is more than one answer * Will identify a single problem to address and a single tool to help resolve the situation |
| Review Questions | What areas are Convergers best at?  (Answer: Abstract conceptualization and active experimentation) |

## Assimilators

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\3YJGCFYP\MC900334606[1].wmfAssimilators are best at abstract conceptualization and reflective observation. This style of learning is often found in basic mathematical and scientific disciplines.

Assimilators tend to be:

* Less concerned with people
* Good at building straw models
* Good at inductive reasoning (bringing various observations into a single explanation)
* Interested in abstract concepts more than people
* More concerned with the theory being logical than its practical uses

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| Estimated Time | 5 minutes |
| Topic Objective | To understand what an assimilative learning style looks like. |
| Topic Summary | Assimilators are best at abstract conceptualization and reflective observation. |
| Recommended Activity | Review the following scenario with participants.  A time management workshop is currently taking place. Participants have been divided into groups of six. They have been asked to review several time management tools and decide which tools seem the most promising. (Some of these tools are well-proven; others are new to the workshop.) They will then take these tools back to the workplace and test them out for a week.  How might an Assimilator behave? |
| Delivery Tips | Possible answers:   * Will think about the reasons behind time management issues * Will try to find common causes and a single explanation for those causes, and a tool to address that explanation * May focus on developing a theoretical guideline for using that tool |
| Review Questions | What areas are Assimilators best at?  (Answer: Concrete experience and reflective observation) |

# Module Three: Kirkpatrick’s Levels of Evaluation

*Knowledge is learning something every day. Wisdom is letting go of something every day.*

*Zen Proverb*

A good evaluation will cover all four dimensions of learning. This module will give you an overview of Donald Kirkpatrick’s four levels of evaluation, which correspond loosely to Kolb’s four learning stages.

## Overview

Kirkpatrick’s evaluation model measures four elements:

Each level is based on the level before it, so in order to achieve results; participants must have a positive experience with the first three levels.

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| Estimated Time | 10 minutes |
| Topic Objective | To understand Kirkpatrick’s four levels of evaluation. |
| Topic Summary | Each level is based on the level before it, so in order to achieve results; participants must have a positive experience with the first three levels.   * Results * Behavior * Learning * Reactions |
| Materials Required | Model on flip chart or PowerPoint |
| Recommended Activity | Review the model with participants. |
| Stories to Share | Other theorists have suggested that a fifth level (ROI) could be included in this model. We have not included this level as we feel it should be part of the “Results” section. |
| Delivery Tips | Discuss how each part of the pyramid is dependent on the part underneath it. For example, if participants have a very negative reaction to the trainer, a minimal amount of learning, change in behavior, and results will take place. |
| Review Questions | What is the foundation of Kirkpatrick’s’ pyramid?  (Answer: Reactions) |

## Level One: Reactions

The most basic level of evaluation is the participants’ reactions to the training.

* Did they like or dislike the training and the trainer?
* How did they feel about the training environment?
* Did they think the training was useful?
* Did they feel comfortable?
* Did they feel they had ample opportunities to participate?

This level can be measured with a few simple tools:

* Verbal feedback during and immediately after the workshop
* Subjective questionnaires during and immediately after the workshop, such as happy sheets (where participants circle a happy face or sad face for each question)

Reaction feedback is fairly easy to gather and measure. It should be gathered as close as possible to the desired time period. (For example, if you wanted to measure reactions to the first day of a workshop, you should gather reactionary feedback at the end of the first day.)

|  |  |
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| Estimated Time | 5 minutes |
| Topic Objective | To understand what reactionary feedback is and how to gather it. |
| Topic Summary | The most basic level of evaluation is the participants’ reactions to the training. This can be gathered via simple questionnaires and verbal questioning. |
| Materials Required | Evaluation Form |
| Planning Checklist | Print one evaluation form per participant |
| Recommended Activity | Go over this course’s evaluation form. Discuss what other reactionary questions could be added. |
| Stories to Share | Remember, participants must have a positive reaction for learning to occur and be transferred. |
| Delivery Tips | Write ideas for additional questions on the flip chart or white board. |
| Review Questions | True or False: Reactionary feedback should be gathered right away. |

## Level Two: Learning

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900048382[1].wmfThe next level of evaluation assesses how much the participant learned. It looks at two basic areas:

* Did trainees learn what we wanted them to learn?
* Was the training experience what we wanted it to be?

This level is typically measured via tests immediately before and immediately after the training. It is important that these assessments are tied closely to the learning objectives.

Note that this level can be measured on an individual or group level. For example, you could have a verbal group-style quiz, or you could have individual assessments. When assessing group performance, however, make sure that each individual can be evaluated.

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| --- | --- |
| Estimated Time | 5 minutes |
| Topic Objective | To understand how to evaluate learning. |
| Topic Summary | The next level of evaluation assesses how much the participant learned. This level is typically measured via tests immediately before and immediately after the training. |
| Materials Required | Pre-Assignment for this workshop |
| Planning Checklist | Ensure that each participant has a copy of the pre-assignment for this workshop. |
| Recommended Activity | Review the pre-assignment. Discuss its positives and negatives as a learning assessment tool. |
| Delivery Tips | Encourage participants to share other examples of learning assessment tools. |
| Review Questions | When should learning be assessed?  (Answer: Immediately before and after the training) |

## Level Three: Behavior

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\EOAYJ771\MC900071005[1].wmfThis level evaluates how much trainees applied the learning and changed their behavior after the training. Key questions should include:

* How quickly did trainees put their knowledge into effect back on the job?
* Were skills used correctly and relevantly?
* Was the behavior change sustained?
* Is the trainee aware of how they have changed?
* Would the trainee be able to share their knowledge with another person?

It can be challenging to evaluate changes at this level, particularly with soft topics like communication and leadership. It is important to develop a well-rounded, accurate evaluation system before training begins. Trainees will need to be evaluated on an ongoing basis in a way that is not intrusive on their daily duties. Tools like case studies, 360 degree feedback, and self-assessments can be useful as long as they are well-designed, consistent, objective, and appropriately timed.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to evaluate behavior changes after the training. |
| Topic Summary | This level evaluates how much trainees applied the learning and changed their behavior after the training. It is important to develop a well-rounded, accurate evaluation system before training begins. |
| Materials Required | Flip chart paper and Markers |
| Planning Checklist | Think of some possible answers for the activity before the workshop. |
| Recommended Activity | Discuss what kind of behavior measurement tools could be used to evaluate trainees’ progress after this workshop. |
| Delivery Tips | If you have more than 15 participants, divide participants into smaller groups. Provide some time for large group debriefing after the activity. |
| Review Questions | True or False: Behavior evaluation systems should be developed after reactionary feedback is gathered. |

## Level Four: Results

The final level of evaluation is quantifiable results. This assesses the effect of the training on the person’s environment (their workplace, home, etc.). These are typically measurements that are in place via normal business systems, such as:

* Number of sales
* Percentage of customer complaints
* Timeliness
* Absenteeism
* Quality ratings and failures
* Third-party inspection ratings (such as food and safety)

This is an important level of evaluation as it is often what high-level executives look for when evaluating the training. They want to know numbers and figures, with proof to back the data up.

These evaluation processes should tie in with day to day business procedures and not cause a lot of extra work. It is important, however, that the trainee knows what measurements are tied to the training before the training begins. This will help them apply context to the training and achieve better results.

As a final note, be careful of outside factors that can cloud ratings. For example, let’s say that you send your salespeople on training and you expect their sales to increase by 5% per month as a result. If the economy crashes two months after the training, your results will be clouded by outside circumstances.

|  |  |
| --- | --- |
| Estimated Time | 5 minutes |
| Topic Objective | To understand how to measure quantifiable results from training. |
| Topic Summary | The final level of evaluation is quantifiable results. This assesses the effect of the training on the person’s environment (their workplace, home, etc.). These are typically measurements that are in place via normal business systems. |
| Recommended Activity | Ask participants about some metrics that they use in their organization that could be tied to training. |
| Stories to Share | Another important element of training is the return on investment (ROI). We’ll look more at ROI in Module Eleven. |
| Delivery Tips | Encourage participants to write down useful metrics in their action plan for further exploration. |
| Review Questions | True or False: This level of evaluation only applies in the workplace. |

# Module Four: Types of Measurement Tools

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*The only real mistake is the one from which we learn nothing.*

*John Powell*

## Goal Setting

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\1JXY5E11\MC900295960[1].wmfIndividual goal setting is an excellent way to measure behavior and results. Trainees should set goals during the workshop and then evaluate their progress at pre-determined intervals afterwards.

In order for goals to be effective, make sure they follow the SMART acronym:

* **Specific:** Success coach Jack Canfield states in his book The Success Principles that, “Vague goals produce vague results.” In order for you to achieve a goal, you must be very clear about what exactly you want. Often creating a list of benefits that the accomplishment of your goal will bring to your life, it will give your mind a compelling reason to pursue that goal.
* **Measurable:** It’s crucial for goal achievement that you are able to track your progress towards your goal. That’s why all goals need some form of objective measuring system so you can stay on track and become motivated when you enjoy the sweet taste of quantifiable progress.
* **Achievable:** Setting big goals is great, but setting unrealistic goals will just de-motivate you. A good goal is one that challenges, but is not so unrealistic that you have virtually no chance of accomplishing it.
* **Relevant:** Before you even set goals, it’s a good idea to sit down and define your core values and your life purpose because it’s these tools which ultimately decide how and what goals you choose for your life. Goals, in and of themselves, do not provide any happiness. Goals that are in harmony with your life purpose do have the power to make you happy.
* **Timed:** Without setting deadlines for your goals, you have no real compelling reason or motivation to start working on them. By setting a deadline, your subconscious mind begins to work on that goal, night and day, to bring you closer to achievement.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to set effective goals. |
| Topic Summary | Individual goal setting is an excellent way to measure behavior and results. In order for goals to be effective, make sure they follow the SMART acronym: Specific, Measurable, Achievable, Relevant, and Timed. |
| Recommended Activity | Have participants set some SMART goals for this workshop that will help them evaluate their behavior changes and subsequent results. |
| Stories to Share | This technique can be used to improve virtually any area of your life. |
| Delivery Tips | If participants are comfortable, have them share some of their goals with the class.  Goals should be recorded in participants’ action plans. |
| Review Questions | What does SMART stand for?  (Answer: Specific, Measurable, Achievable, Relevant, and Timed) |

## Self-Evaluations

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\ZKNEI80I\MC900215486[1].wmfSelf-evaluations are effective at the first three levels of evaluation, and can be effective at the fourth level depending on the topic. Common types of self-evaluations include:

* Pre-workshop and post-workshop tests to assess learning
* Reactionary questionnaires
* Personal assessment quizzes
* Self-reporting metric systems

When measuring reactionary feedback, open-ended questions such as, “How did you feel about the training?” are fine. However, you should also include scale-based questions so that you can evaluate the group as a whole and evaluate the individual on an objective basis. When measuring learning, behavior, and results, questions that are objective and closed or scale-based are necessary for accurate assessment.

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| Estimated Time | 5 minutes |
| Topic Objective | Understand what kinds of self-assessments are appropriate as evaluation tools. |
| Topic Summary | Common types of self-evaluations include:   * Pre-workshop and post-workshop tests to assess learning * Reactionary questionnaires * Personal assessment quizzes * Self-reporting metric systems |
| Materials Required | Flip chart paper and Markers |
| Planning Checklist | Make sure you have four sets of materials. |
| Recommended Activity | Divide participants into four groups. Assign each group a level of evaluation and ask them to come up with some examples of self-assessments for that level. |
| Delivery Tips | If you have more than 30 participants, you may want to have additional groups. |
| Review Questions | What types of questions are best for objective assessment?  (Answer: Closed) |

## Peer Evaluations

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900047859[1].wmfPeer reviews are an excellent tool for measuring behavioral changes. However, you must ensure that the assessment system is well designed to prevent bias.

One excellent tool is 360 degree feedback. This system is designed to gather feedback from all of the people around an employee – their co-workers, subordinates, superiors, clients, etc. There are many resources available that can help you design a good 360 degree feedback system. If the topic that you are training on has high value, it can be worthwhile to take the time to develop a peer review system to accurately measure behavioral changes.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how a peer evaluation can be used to measure results from training. |
| Topic Summary | Peer reviews are an excellent tool for measuring behavioral changes. However, you must ensure that the assessment system is well designed to prevent bias. |
| Materials Required | Worksheet: 360 Degree Feedback Example |
| Planning Checklist | Print out one copy of Worksheet One per participant |
| Recommended Activity | Review the worksheet with participants. |
| Stories to Share | There are many resources available on 360 degree feedback, including complete workshops. |
| Delivery Tips | Encourage discussion about the pros and cons of this type of tool. |
| Review Questions | What level(s) are peer evaluations best used at?  (Answer: Level Three – Behavior) |

## Supervisor Evaluations

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\39XQYYJK\MC900370378[1].wmfSupervisor evaluations are an important part of evaluating behavior changes and assessing results. Like peer reviews, a behavioral evaluation system should be set up before the training. It should be ratings-based and include closed questions to help the supervisor stay objective. When asking supervisors to measure results, those results should tie in with the employee’s regular metrics whenever possible. This achieves two things: it ensures that the measurements are relevant to the employee’s day-to-day duties, and it minimizes the amount of extra work that the supervisor has to do. (Often, if measuring training causes more work for supervisors, they will often avoid completing the evaluation, or spend minimal time doing so.)

Two notes of caution about supervisor evaluations:

* The employee must know which metrics will be evaluated after the training.
* Like peer evaluation, supervisor evaluation can be biased. Develop your metrics accordingly.

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how supervisor evaluations can be used to measure training. |
| Topic Summary | Supervisor evaluations are an important part of evaluating behavior changes and assessing results. |
| Materials Required | Worksheet: Smith Computers |
| Planning Checklist | Print out one worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | Give a copy of the worksheet to each participant. Divide participants into pairs and ask them to read the case study and decide what Andy’s evaluation plan looks like.  After five minutes, bring the group back together and brainstorm. |
| Delivery Tips | Here is the case study.  Andy Jones is a sales manager at Smith Computers Inc. He is sending his team of four salespeople to a comprehensive, three-day training retreat. He has four things he wants to see from the training:   * Better teamwork * Improved documentation * 30% fewer customer complaints * A 10% increase in sales within six months   Based on this information, what might Andy’s evaluation plan look like? |
| Review Questions | What level(s) are supervisor evaluations best used at?  (Answer: Levels Three and Four) |

## High-Level Evaluations

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900359745[1].wmfDepending on the scenario, you may want to ask high-level executives in the organization to complete an evaluation. This will typically reflect behavioral changes and or measurable results. They will be particularly effective at helping you determine if your training was effective for the entire group. Make sure that these types of evaluations are necessary, focused, and short.

As well, although company executives are typically not involved in the nuts and bolts of training, they may want to see a high level evaluation report, particularly if the training was expensive, required by law, or was expected to have a high impact.

When you are planning the training, make sure to gather expectations from these key stakeholders, including timelines for results and the level of detail desired. Then, use this framework to build a results report tailored to their needs. The report will typically reflect behavioral changes and or measurable results.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand what evaluations are appropriate for high-level executives and what reporting they might expect from the person responsible for training. |
| Topic Summary | Depending on the scenario, you may want to ask high-level executives in the organization to complete an evaluation. This will typically reflect behavioral changes and/or measurable results.  As well, although company executives are typically not involved in the nuts and bolts of training, they may want to see a high level evaluation report. |
| Materials Required | Worksheet: Smith Computers |
| Planning Checklist | Print out one worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | In a large group, review the case study. Discuss what high-level executives might evaluate and what kind of evaluation report they might want in return. |
| Delivery Tips | Encourage participants to share examples of how executives in their organizations participate in training. |
| Review Questions | What level(s) are executive evaluations best used at?  (Answer: Levels Three and Four) |

# Module Five: Focusing the Training

In order to prove results from training, your training plan must include clear learning objectives and a clear focus. This will enable you to build a solid evaluation plan. The first step in this process is to determine your training needs.

*I cannot teach anybody anything; I can only make them think.*

*Socrates*

## Performing a Needs Assessment

You should always perform a needs assessment before building your training plan. Even if your organization has handed you a complete training plan, it’s always a good idea to evaluate the needs of your trainees so that you can deliver the most effective training possible.

The needs assessment process has four phases:

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| Estimated Time | 10 minutes |
| Topic Objective | To understand the phases of a needs assessment. |
| Topic Summary | The needs assessment process has four phases: Goals, Gaps, Get, and Group. |
| Materials Required | Worksheet: Smith Computers |
| Planning Checklist | Print out one worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | Work through the four phases of the needs analysis process for the case study. |
| Stories to Share | This is just an introduction to needs assessments. If participants want more information, refer them to the reading list. |
| Delivery Tips | Encourage participants to be creative with details if necessary. |
| Review Questions | What are the four phases of a good needs assessment?  (Answer: Goals, Gaps, Get, Group) |

## Creating Learning Objectives

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900388888[1].wmfOnce you know what participants need from the training, you can write specific objectives that you want them to meet. You should begin by writing high-level objectives. For example, a high-level objective for a word processing class might be, “Understand how to format pages.” A more detailed objective might be, “Understand how to change margins, add page numbers, and add borders for individual pages.”

Objectives typically fall into one of three categories:

* Knowledge: Facts that a trainee should learn and be able to recall.
* Skills: A task that a trainee should be able to perform.
* Abilities: A combination of knowledge and skills that results in a desired behavior.

Here is an example of each type from our word processing course:

* Knowledge: What page formatting commands are available?
* Skills: Know how to perform various page formatting commands.
* Abilities: Format a page to various specifications.

Knowledge objectives are typically written as a question or in category form. Skill and ability objectives are typically written with a verb at the beginning. Objectives should also include a measurement standard where appropriate, such as a dollar amount, percentage, or success rate.

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how to write good learning objectives. |
| Topic Summary | * Objectives can be written at either a high level or on a very detailed level. * Objectives usually involve knowledge, skills, or abilities. * Objectives should include a measurement standard. |
| Materials Required | Flip chart paper and Markers |
| Recommended Activity | Divide participants into groups of four to six and ask them to write three high-level learning objectives for this course. |
| Stories to Share | This is a very high level overview of writing learning objectives. Participants may want to consult our Train-the-Trainer course for more information. |
| Delivery Tips | If there is time, bring the group back together, and debrief. |
| Review Questions | What are the three categories of objectives?  (Answer: Knowledge, Skills , and Abilities) |

## Drilling Down Into Content

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900336022[1].wmfOnce you have high-level objectives written, you can write more specific objectives based on your trainees’ needs. You will probably not want to write a detailed objective for every topic in your course, but rather create several detailed objectives about the most important evaluation items.

For example, in a word processing course, you might cover several different aspects of page formatting. The detailed objective might be, “Understand how to properly format a page in landscape orientation according to the Smith Computers style guide.”

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how to write detailed learning objectives. |
| Topic Summary | Once you have high-level objectives written, you can write more specific objectives based on your trainees’ needs. |
| Materials Required | Flip chart paper and Markers |
| Recommended Activity | Divide participants into groups of four to six and ask them to write five detailed learning objectives for this course. |
| Delivery Tips | Discuss how the detailed learning objectives could differ based on the training audience. |
| Review Questions | True or False: Every topic covered in a training course should have a detailed objective. |

# Module Six: Creating an Evaluation Plan

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900237767[1].wmfAn evaluation plan should be part of any training plan. It should be created at the same time – after the needs analysis and objectives are outlined. In this module, we’ll look at the four key components of an evaluation plan.

*Only knowledge that is used sticks in your mind.*

*Dale Carnegie*

## What Will We Evaluate?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\39XQYYJK\MC900363638[1].wmfFirst, identify what you are going to evaluate. This should be based on the learning objectives you have identified.

Here are some tips for writing evaluation points:

* Each point should begin with a verb
* Points should be objective and measurable
* You should have approximately four points per eight hours of training (depending on how specific the points are)
* Points should be approved by stakeholders and reviewed with trainees

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how to identify evaluation points. |
| Topic Summary | What you are going to evaluate should be based on the learning objectives you have identified. |
| Materials Required | Worksheet: Smith Computers  Worksheet: Evaluation Plan Template |
| Planning Checklist | Print out one copy of each worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | Divide participants into groups of four to six. They will use these groups for the rest of the topic. Have participants identify four evaluation points for the case study. |
| Stories to Share | Participants can use their material from the last topic as a resource. |
| Review Questions | List one essential element of an evaluation point. |

## When Will the Evaluation be Completed?

Next you should determine which level the evaluation will assess. This will help you determine a time frame for each evaluation point.

* Before the training
* During the training
* After the training

Remember, some points may be evaluated at several levels and or time frames.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to add time points to the evaluation plan. |
| Topic Summary | Determine which level the evaluation will assess and decide on a time frame for each point. |
| Materials Required | Worksheet: Smith Computers  Worksheet: Evaluation Plan Template |
| Planning Checklist | Print out one copy of each worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | Have participants work in their groups to identify a time frame for each learning point. |
| Delivery Tips | If there is time, have participants share their thoughts so far. |
| Review Questions | True or False: Each evaluation point should only be assessed once. |

## How Will We Evaluate It?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900360516[1].wmfOur third step is to determine what evaluation tool you will use to perform the evaluation at each time point identified. Over the next few modules, we will look more closely at tools that are appropriate for the various time frames, but here is a quick overview of some tools to consider.

* Goal setting
* Verbal feedback
* Group quizzes
* Quiz games
* Formal tests and exams
* 360 degree feedback
* Metric gathering
* Skill assessments
* Role plays
* Questionnaires and inventories
* Pre-assignments and homework

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| Estimated Time | 10 minutes |
| Topic Objective | To identify some evaluation tools. |
| Topic Summary | Tools can include goal setting, verbal feedback, group quizzes, quiz games, formal tests and exams, 360 degree feedback, metric gathering, skill assessments, role plays, questionnaires, inventories, pre-assignments, and homework. |
| Materials Required | Worksheet: Smith Computers  Worksheet: Evaluation Plan Template |
| Planning Checklist | Print out one copy of each worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | Have participants work in their groups to identify some possible evaluation tools for each learning point. |
| Stories to Share | The list we have provided here is just to get participants started. |
| Delivery Tips | If there is time, have participants share some additional tools that they came up with. |
| Review Questions | List two possible evaluation tools. |

## Who Will Perform the Evaluation?

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900441523[1].wmfThe last part of the evaluation plan is to decide who will assess each point. Your choices include:

* The trainee
* Their supervisor (direct or indirect)
* Their peers
* Their trainer

Remember, each point can have multiple assessors.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to identify an assessor for each evaluation point. |
| Topic Summary | The last part of the evaluation plan is to decide who will assess each point. |
| Materials Required | Worksheet: Smith Computers  Worksheet: Evaluation Plan Template |
| Planning Checklist | Print out one copy of each worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | Have participants identify an assessor for each part of their evaluation plan. |
| Delivery Tips | Review participants’ completed evaluation plans. |
| Review Questions | True or False: The trainee should assess at least one evaluation point. |

# Module Seven: Assessing Learning before Training

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900089893[1].wmfSo far, we have looked at some general tools for evaluation. In this module, we will focus on some tools that you can use to perform evaluations before training begins.

*I am always ready to learn although I do not always like being taught.*

*Winston Churchill*

## Workplace Observation

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900070830[1].wmfThe first tool we are going to discuss is workplace observation, where current workplace behaviors are observed and reported on. It can be done by the trainee, their peers, their supervisor, or their clients.

It is important that observations be recorded and evaluated in an objective way. One good way to do this is to develop a rating system. Or, if you are gathering feedback from multiple sources, develop a 360 degree feedback rating to increase its accuracy.

Observation should be supplemented by other, more objective evaluation methods.

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how to use workplace observation as a training tool. |
| Topic Summary | Current workplace behaviors are observed and reported on. It can be done by the trainee, their peers, their supervisor, or their clients. |
| Materials Required | Flip chart paper and Markers |
| Planning Checklist | Think of some times when you have used workplace observation to evaluate trainees before a workshop. |
| Recommended Activity | Brainstorm scenarios where workplace observation would be useful. |
| Delivery Tips | You can perform this activity in small or large groups. |
| Review Questions | True or False: Workplace observation should be supplemented by more objective evaluation methods. |

## Objectives Assessment

Before the workshop, it can be a good idea to give participants the learning objectives and ask them how they would rate their level of knowledge with those objectives before the workshop. You can even ask participants to note where they would like to be in a week, a month, and a year. It is important that participants be given a rating scale so that results are measurable.

You can also turn this type of assessment into a 360 degree feedback tool by asking supervisors and peers to evaluate participants as well. It can be particularly valuable for supervisors to use this tool to start a discussion about what their expectations from the training are.

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| Estimated Time | 10 minutes |
| Topic Objective | To understand what an objectives assessment can look like. |
| Topic Summary | Before the workshop, it can be a good idea to give participants the learning objectives and ask them how they would rate their level of knowledge with those objectives before the workshop.  Supervisors and peers can also assess participants on these objectives. |
| Materials Required | Flip chart paper and Markers |
| Recommended Activity | List the pros and cons of an objectives assessment. |
| Delivery Tips | This activity can be done in large or small groups. |
| Review Questions | Who can perform an objectives assessment?  (Answer: Trainees, their supervisors, and/or their peers) |

## Pre-Assignments and Pre-Tests

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FZCJR17Y\MC900055154[1].wmfAnother useful tool is to design a pre-assignment or pre-test around the content of the course. Some ways to do this:

* Self-analysis or supervisor analysis as discussed previously
* Case study
* Reading assignment
* Learning wish list
* Test on prerequisite knowledge
* Goal setting
* Personal case study (for example, have participants come to the class with a problem or project)

When designed properly, these pre-workshop homework assignments can accomplish a few things:

* Get the participant in the right frame of mind for the workshop
* Provide participants with background knowledge
* Get participants thinking about what they want, making learning more relevant to them
* Help you assess participants’ knowledge and needs, and target your course more accurately
* Help you assess participants’ commitment to the course

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| Estimated Time | 10 minutes |
| Topic Objective | To understand the value of assignments and tests before the workshop. |
| Topic Summary | Another useful tool is to design a pre-assignment or pre-test around the content of the course. |
| Materials Required | Pre-Assignment  Flip chart paper  Markers |
| Planning Checklist | If possible, bring in examples of pre-assignments from other classes. |
| Recommended Activity | Divide participants into two groups. Group A will critique the pre-assignment for this class. Group B will come up with some other ideas for pre-assignments for this class.  After five minutes, have each group present their ideas. |
| Stories to Share | Be creative with pre-workshop evaluations – the possibilities are endless! |
| Delivery Tips | If you have more than 30 participants, you may want to use more groups. |
| Review Questions | List one type of pre-workshop evaluation tool. |

# Module Eight: Assessing Learning during Training

C:\Program Files (x86)\Microsoft Office\MEDIA\CAGCAT10\j0233018.wmfOften, trainers may assess learning before and after training, but they may neglect to check in with trainees while they are learning. It’s very important to include this in your training plan, particularly since most training programs start with foundation concepts and build towards advanced concepts. If your trainees get lost at the beginning, your entire program could be in jeopardy.

*The mediocre teacher tells. The good teacher explains. The superior teacher demonstrates. The great teacher inspires.*

*William Arthur Ward*

## Reviewing Learning Objectives

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900311860[1].wmfAt the beginning of the program, make sure you review the learning objectives of the course with participants. Give them the opportunity to give you feedback about the objectives:

* Are all the objectives clear?
* Is there anything that is missing?
* Do the objectives seem reasonable?
* Do participants understand how these learning points can translate back to the workplace?

During the program, check in with participants to make sure you’re still on track with the learning objectives. When participants are asked to perform evaluations, point out the ties back to the learning objectives.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to review learning objectives. |
| Topic Summary | At the beginning of the program, make sure you review the learning objectives of the course with participants. |
| Recommended Activity | Have participants sit in a circle. Start with the person who has the longest hair. Have this person give one word to describe today’s workshop. Then, the person to their left will provide a word. Move around the circle in this way, ensuring that each person comes up with an original word. |
| Stories to Share | There are many fun ways to review learning objectives. |
| Delivery Tips | This activity is best suited for groups of 10 to 15. |
| Review Questions | True or False: Participants should be given the opportunity to give feedback about objectives. |

## Performing Hip-Pocket Assessments

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\EOAYJ771\MC900383528[1].wmfDuring the course, check in with participants and evaluate them on reactionary and learning levels. Questions that you will want to ask include:

* How do participants feel about the training?
* What has been the best thing about the training so far? The worst thing?
* What have participants learned?
* What would participants still like to learn?

You may also want to ask specific questions about key content points.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to perform a hip pocket assessment. |
| Topic Summary | During the course, check in with participants and evaluate them on reactionary and learning levels. |
| Recommended Activity | Perform a quick hip pocket assessment about the training so far. |
| Stories to Share | Before your workshop, plan some hip pocket questions. |
| Delivery Tips | Encourage participants to suggest questions. |
| Review Questions | What levels do hip pocket assessments evaluate?  (Answer: Reactions and Learning) |

## Quizzes and Tests

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* Workshops that have a lot of content
* Workshops with difficult content
* Long workshops
* Topics that depend on each other

Don’t forget that a test doesn’t have to mean an hour-long exam. Try some of these fun ideas instead:

* Divide participants into pairs or teams. Have them write quiz questions for each other. If the group is competitive, make it a tournament.
* Place sheets of flip chart on the walls with key topic words. Assign a group to each sheet and have them review that topic. Or, have participants walk around and jot their own notes on the sheet, and review as a group.
* Do you remember the picnic game from your childhood? Each person in the group would bring something to the picnic that started with a particular letter. The group would start with A and move through the alphabet. Play this game with your group, but choose a topic related to the workshop.
* Play a game show like Jeopardy or Wheel of Fortune, with topics tied to your content.
* Have participants sit in a circle. Toss a soft ball to a person and have them name one thing that they have learned so far. Have participants toss the ball around until everyone has spoken. Make sure to include yourself in the game!

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| Estimated Time | 10 minutes |
| Topic Objective | To identify some ways to review content |
| Topic Summary | There are many fun, effective ways to test your participants. |
| Recommended Activity | Use one of the ideas from this topic to review content from today. Or, substitute your own game. |
| Stories to Share | Icebreaker books often have great ideas for content reviews. |
| Delivery Tips | Encourage participants to share their own creative ways of reviewing content. |
| Review Questions | True or False: Tests are always written. |

## Skill Assessments

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**Demonstrations:** Demonstrations can be a very powerful teaching tool, particularly for complex tasks. One method is to demonstrate the desired task, and then have participants demonstrate it back to you. Or, place participants in groups or pairs and have them demonstrate the task to each other. Just monitor the activity to make sure that the information is correct.

**Role Play:** Role plays are often listed as participants’ least favorite part of a workshop, but they are very helpful when learning new behaviors. Conflict resolution, mediation, negotiation, communication, and training are just a few of the topics where role plays can be helpful.

To make the most of role plays, try these tips:

* Give participants the option to take an active or inactive role.
* Have clear instructions and roles.
* Provide constructive feedback.
* Provide tip sheets on the behavior to be role played.

**Games:** Games can provide a fun yet educational learning experience for participants. Make sure to practice the game ahead of time and make sure that it truly helps participants practice the skill that they are learning. And don’t forget – always have a backup plan.

**Simulations:** When they are well designed, simulations are excellent ways to assess how well a participant has learned a skill. They are particularly useful in situations where it is imperative that participants have excellent knowledge before going ahead with the real task, such as medical procedures or machine operation.

You can enhance the usefulness of these tools by adding a subjective rating system to them. For example, you could have a scorecard for demonstrations and role plays, or perhaps the simulator can provide a report on the user’s success and failure rates.

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| Estimated Time | 10 minutes |
| Topic Objective | To identify some tools to evaluate changes in behavior and attitude. |
| Topic Summary | Demonstrations, role play, games, and simulations are all excellent evaluation tools. |
| Materials Required | Flip chart paper and markers |
| Recommended Activity | Divide participants into four groups. Assign each group a category from the topic (demonstrations, role play, games, or simulations). Ask each group to come up with some scenarios where their type of assessment could be used. Bring the group back together to debrief. |
| Stories to Share | This is just an introduction to these types of tools. |
| Delivery Tips | If you have extra time, have participants prepare a sample from their category. |

# Module Nine: Assessing Learning after Training

*Life is a succession of lessons which must be lived to be understood.*

*Ralph Waldo Emerson*

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900237236[1].wmfYour evaluation plan should include evaluations after the training is finished. There are two reasons for this. One is that some skills take months or even years to develop. Another is that you want to make sure that the trainee continues to apply their knowledge after the training is completed.

## Evaluation Timelines

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900365672[1].wmfUse this matrix to determine what type of evaluation you should be performing at each time gate.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Reactions** | **Learning** | **Behavior** | **Results** |
| Immediately after training | X | X |  |  |
| A week after training |  | X | X |  |
| A month after training |  |  | X |  |
| Six months after training |  |  | X | X |
| Beyond six months |  |  | \* | \* |

We have placed an asterisk for the timeframe of beyond six months because this time gate is optional. Usually, if trainees are displaying the required behavior at the six month mark and results are visible, then your evaluation can be complete. In some cases, however, you may need to track behaviors and results for a longer period of time.

|  |  |
| --- | --- |
| Estimated Time | 10 minutes |
| Topic Objective | To understand what level of evaluation to perform at key time gates. |
| Topic Summary | Timelines to evaluate each metric Reactions, Learning, Behavior, and Results |
| Materials Required | Blank grid on flip chart paper and markers |
| Planning Checklist | Draw the grid shown above on flip chart paper, but do not mark the X’s and asterisks. |
| Recommended Activity | Have participants fill in the grid. |
| Delivery Tips | If desired, you can draw up several grids and perform this activity in small groups. |
| Review Questions | What level of evaluation should be performed immediately after training?  (Answer: Reactions and Learning) |

## Learning Journal

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\MP321RS9\MC900297659[1].wmfA learning journal is an excellent tool to help participants track their progress after training. It can be as simple as a notebook or word processing file. Participants should make a daily or weekly entry summarizing what skills in training they used, what challenges they encountered, how they handled those challenges, and any relevant information they learned.

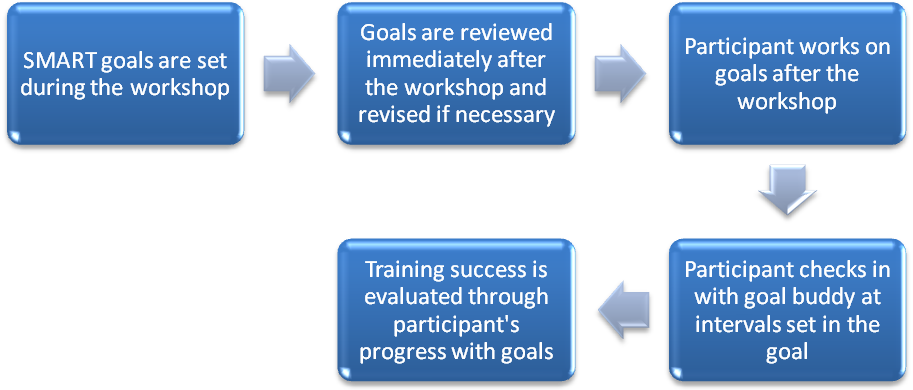
For maximum effectiveness, try these tips:

* Provide trainees with a template to use.
* Ask trainees to fill out the journal at a particular time (i.e. daily, weekly, bi-weekly, etc.).
* Set up check-in points with you, a buddy, or their supervisor.
* Encourage trainees to use the journal to identify points for further learning.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand what a learning journal is and how to use it. |
| Topic Summary | Participants should make a daily or weekly entry summarizing what skills in training they used, what challenges they encountered, how they handled those challenges, and any relevant information they learned. |
| Materials Required | Worksheet: Learning Journal Template |
| Planning Checklist | Print out one copy of each worksheet per participant. |
| Recommended Activity | Set up a learning journal program for participants to use after this workshop. |
| Review Questions | True or False: The learning journal must look the same for every workshop you teach. |

## Goal Setting

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9MJXCRQW\MC900335661[1].wmfIn Module Four, we looked at how to set good goals and discussed goal setting as a measurement tool. We’d like to take a few more minutes and look at a process for using goals as a post-workshop measurement tool.



In order for goal setting to be a useful measurement tool, you must:

* Create well-defined goals (remember the SMART acronym)
* Coach participants to work on their goals
* Follow up on your commitment to use goals as a measurement tool

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how to use goal setting as a measurement tool. |
| Topic Summary | • Create well-defined goals (remember the SMART acronym)  • Coach participants to work on their goals  • Follow up on your commitment to use goals as a measurement tool |
| Materials Required | Action Plan |
| Planning Checklist | Ensure that each participant has an action plan. |
| Recommended Activity | Have participants set some goals for this workshop and record them in their action plan. |
| Stories to Share | Remember the SMART acronym: Specific, Measurable, Achievable, Relevant, and Timed. |
| Delivery Tips | Encourage participants to identify a follow-up buddy and set some check-in points. |
| Review Questions | True or False: Goals should not be modified after the workshop. |

## Additional Methods of Evaluation

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900197753[1].wmfMany of the other methods of evaluation that we have already discussed can be used to assess learning after training, including:

* Quizzes and tests
* 360 degree feedback
* Self-analysis or supervisor analysis
* Metrics tracking
* Workplace observation
* Follow-up meetings

Remember, post-workshop evaluations should be:

* Easy to complete
* Effective
* Not time consuming
* Measurable
* Consistent
* As objective as possible

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| Estimated Time | 5 minutes |
| Topic Objective | To identify some additional methods for assessing learning after training. |
| Topic Summary | Many of the other methods of evaluation that we have already discussed can be used to assess learning after training. |
| Materials Required | Flip chart paper and markers |
| Planning Checklist | If possible, bring in some samples of post workshop evaluations that you have used. |
| Recommended Activity | Divide participants into groups of four to six. Ask them to brainstorm some evaluation tools. |
| Stories to Share | Don’t re-invent the wheel – there are many excellent evaluation resources out there. Just remember to get the proper permissions. |
| Delivery Tips | If there is time, bring the group back together, and create a compiled list. |

# Module Ten: The Long Term View

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\9PDUOZYV\MC900354126[1].wmfIn rare cases, you may need to evaluate participant progress beyond six months post-training. This module will give you some guidelines for those situations. Patience and an understanding of how long some changes take will provide an excellent base is long term evaluations are required.

*Live as if you were to die tomorrow. Learn as if you were to live forever.*

*Mahatma Gandhi*

## Creating a Long Term Evaluation Plan

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900055544[1].wmfWhen creating a long term evaluation plan, make sure the following points are covered:

* Delegate long-term evaluation to the appropriate supervisors.
* Build a system where supervisors are accountable for evaluations.
* Have an organizational champion to follow up and make sure evaluations are done on time.
* Check in with the organization to make sure the evaluation strategy is working. If it’s not working, change it!
* Get executive support for your plan.

Remember, evaluation does cost time and money, so evaluations past the six month mark should only be part of the evaluation plan when absolutely necessary.

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how to create a long term evaluation plan. |
| Topic Summary | * Delegate long-term evaluation to the appropriate supervisors. * Build a system where supervisors are accountable for evaluations. * Have an organizational champion to follow up and make sure evaluations are done on time. * Check in with the organization to make sure the evaluation strategy is working. If it’s not working, change it! |
| Materials Required | Flip chart paper and markers |
| Recommended Activity | Brainstorm situations where long-term evaluation may be necessary. |
| Delivery Tips | This activity can be performed in large or small groups. |

## Methods of Evaluation

The following tools are most effective for long-term evaluations:

* Repeated assessments
* 360 degree feedback
* Knowledge re-testing
* Metric tracking
* Structured observation and interviewing

Long-term evaluations must be built carefully, with a focus on measurability, sustainability, and consistency.

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| --- | --- |
| Estimated Time | 10 minutes |
| Topic Objective | To identify appropriate long-term evaluation methods. |
| Topic Summary | The following tools are most effective for long-term evaluations:   * Repeated assessments * 360 degree feedback * Knowledge re-testing * Metric tracking * Structured observation and interviewing |
| Materials Required | Worksheet: Smith Computers  Flip chart paper and markers |
| Planning Checklist | Print out one copy of each worksheet per participant. If desired, you can write out the case study on flip chart or PowerPoint. |
| Recommended Activity | Have participants brainstorm some long-term methods of evaluation for the case study. |
| Delivery Tips | This activity can be performed in large or small groups. |
| Review Questions | List one possible long-term evaluation method. |

## Documenting Lessons Learned

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\EOAYJ771\MC900365846[1].wmfAt the end of your evaluation period, you should take time to document what went well with your evaluation plan and what you would do differently next time. Then, when building your next evaluation plan, keep this feedback in mind.

Questions you ask yourself include:

* What went well?
* What could have gone better?
* What did I learn?
* What is one thing that I will definitely do again?
* What is one thing that I will definitely not do again?
* What changes did I have to make to my plan during its execution? Why were these changes necessary?

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| Estimated Time | 10 minutes |
| Topic Objective | To understand how to build a list for lessons learned. |
| Topic Summary | At the end of your evaluation period, you should take time to document what went well with your evaluation plan and what you would do differently next time. |
| Recommended Activity | Brainstorm additional questions that could be included in a lessons learned list. |
| Stories to Share | This is a useful tool to evaluate any project or plan. |
| Delivery Tips | This activity can be performed in small or large groups. |

# Module Eleven: Calculating the Return on Investment (ROI)

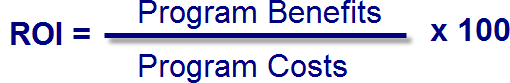
Companies often spend a lot of money on training, so it only makes sense that they will want to see what they got back from the training. In some cases, this may be easy – you may be able to see a drop in hard numbers (like product defects, customer complaints, or days absent) as a result of your training. In other cases, the benefit might involve something much harder to calculate, like reduced stress, improved teamwork, or better communication. This module will show you how to calculate the return on investment (ROI) for any training program.

*An organization's ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage.*

*Jack Welch*

## A Basic ROI Formula

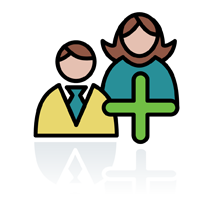
C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\1JXY5E11\MC900389046[1].wmfThe basic ROI formula looks like this:



The result will give you a percentage.

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| Estimated Time | 10 minutes |
| Topic Objective | To understand the formula used for calculating return on investment. |
| Topic Summary | Return on Investment |
| Materials Required | Formula on flip chart or PowerPoint |
| Planning Checklist | Prepare the formula before the workshop. |
| Recommended Activity | Review the formula. Discuss what issues participants foresee. |
| Stories to Share | This is a traditional financial formula used for many purposes. |
| Review Questions | What is the formula for ROI? |

## Identifying and Measuring Tangible Benefits

Tangible benefits are those with a number attached to them. Some examples include:

* Rate of absenteeism or turnover
* Sales
* Profits
* Number or dollar value of returns
* Number or percentage of customer complaints
* Length of downtime (due to accidents, machine failure, etc.)
* Production volume
* Error or defect rate
* Customer and/or employee satisfaction
* Response time

When gathering these metrics, make sure to gather information for a few months before and a few months after the time period that you are measuring, as well as data for the same time period in years previous. You will also want to be aware of external factors that could affect your data, such as weather, economic conditions, and changes in the company.

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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to identify and measure tangible benefits. |
| Topic Summary | Tangible benefits are those with a number attached to them. |
| Materials Required | Flip chart paper and markers |
| Planning Checklist | If desired, you can put the list of sample programs on flip chart or PowerPoint. |
| Recommended Activity | Divide participants into groups of four to six. Ask them to think of tangible metrics that could be used to evaluate these training programs:   * Workplace safety * Lead management training for salespeople * Using a new production machine * Ergonomics * Stress management |
| Delivery Tips | You can substitute your own ideas for the example training programs. |
| Review Questions | List one type of tangible benefit. |

## Identifying and Measuring Intangible Benefits

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\31B2RP17\MC900361058[1].wmfTraining often provides more intangible benefits, such as better communication, improved anger and stress management, clearer writing skills, or more effective time management. It can be hard to put dollars and cents value on these skills; however, we are often asked to do so to prove that the training has been worthwhile.

Here are some ways to convert intangible benefits to hard numbers:

* Calculate the time saved in hours and multiply by the person’s hourly wage
* Tie the intangible benefit to a tangible benefit

|  |  |
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| Estimated Time | 5 minutes |
| Topic Objective | To understand how to identify and measure intangible benefits. |
| Topic Summary | Intangible benefits are those without a hard number attached. |
| Materials Required | Flip chart paper and markers |
| Planning Checklist | If desired, you can put the list of sample programs on flip chart or PowerPoint. |
| Recommended Activity | Divide participants into groups of four to six. Ask them to think of intangible benefits that could result from these training programs, and how those intangible benefits could be measured.   * Workplace safety * Lead management training for salespeople * Using a new production machine * Ergonomics * Stress management |
| Delivery Tips | You can substitute your own ideas for the example training programs. |
| Review Questions | List one type of intangible benefit. |

## Calculating Total Costs

Our next step is identifying the cost of the program. This should include:

* Employee salaries paid while they were attending the program
* Trainee expenses such as food, hotel, and transportation
* Cost of materials and facility for the program
* Facilitator cost before, during, and after the program
* Development and licensing costs
* Administrative costs

|  |  |
| --- | --- |
| Estimated Time | 5 minutes |
| Topic Objective | To understand what should be included when calculating the cost of training. |
| Topic Summary | Include all costs related to the program. |
| Recommended Activity | Review the list of costs with participants and see what else you can add to the list. |
| Stories to Share | Always include exact figures when reporting costs. |
| Delivery Tips | This activity can be performed in large or small groups. |
| Review Questions | True or False: Staff salaries should be included in the cost of training. |

## Making a Business Case

C:\Users\Darren\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\FTRMPN7N\MC900412586[1].wmfAll of the evaluations and measurements that you perform before, during, and after a training session should give you quantifiable, consistent information about the training that you performed. This information will help you:

* Improve your training programs
* Have confidence in yourself as a trainer
* Gain support for your programs

You can also use this information when building a business case or proposal for your next training program. A business case usually has the following items:

* Executive Summary
* Background Information (to provide context)
* Needs Analysis
* Recommendations
* Anticipated Benefits
* Estimated Cost
* Next Steps
* References and Supporting Materials

|  |  |
| --- | --- |
| Estimated Time | 5 minutes |
| Topic Objective | To receive an introduction to business cases. |
| Topic Summary | All of the evaluations and measurements that you perform before, during, and after a training session should give you quantifiable, consistent information about the training that you performed. You can use this information when building a business case or proposal for your next training program. |
| Materials Required | Sample business cases |
| Planning Checklist | Gather copies of business cases for training programs that are relevant to participants’ industries. |
| Recommended Activity | Review business case samples. |
| Stories to Share | We have included some writing resources in the Recommended Reading List. |
| Delivery Tips | Encourage critique of the samples. |
| Review Questions | List one benefit of a thorough evaluation. |

# Module Twelve: Wrapping Up

Although this workshop is coming to a close, we hope that your journey to improve your training skills is just beginning. Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come. We wish you the best of luck on the rest of your travels!

*Experience is the name everyone gives to their mistakes.*

*Oscar Wilde*

## Words from the Wise

* **MC900370486[1]Charlie Munger**: Forgetting your mistakes is a terrible error if you are trying to improve your cognition.
* **Og Mandino:** Take the attitude of a student, never be too big to ask questions, never know too much to learn something new.
* **Aldous Huxley**: Experience is not what happens to a man; it is what a man does with what happens to him.

## Parking Lot

Review the items on the parking lot. Some items may need one-to-one participant follow up. You may be able to clear other items up now. Follow-up workshops may even be appropriate.

## Action Plans and Evaluations

Do a quick round robin and ask everyone to share one thing that they learned today. Then, ask participants to make sure their action plans and evaluations are complete.

If possible, ask participants to buddy up and set up a follow-up system, so that they can check up on each other in the coming days, weeks, and months. If appropriate, provide your contact information in case they have any questions.