

26 Key issues on the evaluation of training and development activities

Summarised by Andrew Gibbons

Downloaded free from: www.andrewgibbons.co.uk

1. Most organisations do not thoroughly evaluate training and development events.
2. Formal, obvious, structured, normally group-based events (meaning courses) receive far more evaluative attention than other, informal activities.
3. What evaluation that does go on centres on 'happy sheets', that focus on the event itself, with little or no consideration of learning transfer or back-to-work issues that explore the key variables and true influences that determine the lasting value of any learning event.
4. There is a role for 'happy sheets', as they can form a part of a total evaluation strategy, but they should not be *all* that is done to establish the long term cost effectiveness of a learning event.
5. The four stage model of evaluating the value of an event at learner reaction; learning; job behaviour and organisation effect levels is a powerful tool.
6. Most line managers are not actively involved in the process of evaluating training and development activities, but we must not assume they don't want to be.
7. Failing to thoroughly evaluate the true worth of training and development costs a lot of money. A rigorous analysis of costs versus the value of sustainable application of learning would highlight what does and does not prove to be worth the expense - and why.
8. The 'Investors in People' Standard gives, in part four, valuable specific criteria for evaluation.
9. Too many line and senior managers, and for that matters (who should certainly know better), write training and development off as a net cost, without any attempt at maximising the long term contribution of those activities to those of operational and financial performance.
10. Many oppose spending time on evaluation on the basis that it would cost too much. This may on accession be true, but such a decision is normally made without any consideration of why or how such an analysis would be made - or for that matter the potential costs of *not* doing so.
11. Validation differs from evaluation - the first checks whether or not set objectives have been met, the latter measures long term benefits against often more quantifiable costs. Validation is rarely mentioned, as 'evaluation' is normally the label used to describe any efforts to measure value.
12. Many training and development generated back-to-work changes take a long time to show themselves, and, significantly, are often very difficult to attribute. Thus the timing of any attempt to establish transferred learning requires forethought, as it all too easy to seek to identify long term changes for the better too early.
13. Transfer of learning is the key issue in evaluation, and a thorough evaluation should focus upon what has, and has not been learned, then put into practice back at work, and why. The *why* is very often overlooked, but can, if investigated well indicate how to maximise the value of later events or activities. The *what* in isolation can lead to erroneous conclusions being drawn from an incomplete analysis.
14. Such evaluation that happens to focus on the implementation phase of the total developmental process, with little or no attention given to the success or otherwise of learning needs identification; design activities, or indeed, the evaluation process itself.

15. Line managers should take an active, positive role in all aspects of the development cycle. This means moving totally away from 'have a good holiday?' cynicism to playing a key part in evaluating the value of all development activities, both on and off the job.
16. We need to be very clear on how line managers are to be involved in the evaluation process, and be ready with bottom line positive results that confront the 'what's in it for me?' barriers, after all, as they keep telling us, they are so very busy.
17. Few if any line managers have the development of their staff really spelled out within a job description, or focused upon at appraisal - thus their value during evaluation efforts is often not optimised.
18. It is extremely difficult to evaluate in anything like precise terms the monetary value on hard to identify and attribute, improved return-to-work behaviour. The significance of the transferred learning is a key issue, as major unsustained changes are of less value than planned and supported sustainable applications of what has been learned.
19. Learners themselves receive little or no attention during most evaluation efforts. This is a very serious omission, as *their* acceptance of the need to learn; their level of engagement and contribution; their motivation, and their willingness to confront transfer barriers are absolutely crucial to the success of any event or activity. In other words, if it doesn't work...it may be *their* fault!
20. A lot of what evaluation does occur collects valuable data that is not ever used. This may be because the information is potentially harmful (for instance indicating a low or nonexistent payoff).
21. Shouldn't learners and their line managers get feedback on the outcomes of evaluative activities?
22. Those that lead an even are rarely asked for views that contribute to the evaluation exercise, yet they often the subject of critical (and not always constructive) comments of learners...who may well be taking the opportunity to escape accepting appropriate responsibility for making a success of the event.
23. A great deal more can typically be done to assist learning transfer *during* an event or activity. This does not have to be left to chance, and a competent facilitator can significantly enhance the likelihood of the back-to-work application of what has been learned from off the job events while these are happening.
24. Those concerned with the evaluation effort should not assume their interest in determining the value of an event is shared by its participants or sponsoring line managers.
25. The motivation to learn will be reflected in learner responses to efforts to evaluate at any stage in the developmental process.
26. Perhaps more explicit mention should be made of how any development event should contribute to organisational effectiveness (and add value) at the design phase, when resources are committed.