

# PROVING TRAINING VALUE - A CASE STUDY

BY KYRAN NEWELL  
AND NICKY TRAINOR

There will be times in your career as a learning and development professional that you will be asked to prove the value of the training you are proposing or have delivered. At this point in time you will need to be able to confidently explain how you plan to prove the value of training and know which methodology to use.

## Evaluation at ODI

Since 2012 Organisation Development Institute (ODI) has deployed Kirkpatrick Evaluation in the design and evaluation of each program it has delivered. Information about each of the four levels - Reaction, Learning, Behaviour and Results - has been collected in a consistent way across each program; providing a substantial database able to be usefully analysed.

Kirkpatrick Evaluation is an evidential methodology; collecting data during and after training that establishes participant reaction and learning, the quantum of changes to skills and behaviours deployed at work, and the contributions to improved organisation results.

In 2016 we compared the results of the 138 programs we have delivered and evaluated during the four years since we deployed Kirkpatrick. We did this to understand where we are doing well and where our programs could be more

effective. For the purpose of this analysis, the programs have been aggregated into three categories: Public Short Courses, Custom Courses and Coached Custom Courses.

**Public Short Courses:** programs where individuals from different organisations enrol, participate and return to work without post-workshop support to apply workshop learning and new practices at work

**Custom Courses:** programs where a cohort from a single organisation is enrolled, participates and returns to work with program colleague support to apply learning as new practices at work

**Coached Custom Courses:** programs where a cohort from a single organisation is enrolled, participates and returns to work with individual coaching support to apply workshop learning as new practices at work.

There is a gradation of increased post-workshop application support from Public Short Courses through to Coached Custom Courses, accompanied by an increasing expectation that participants will undertake application activity. These supports and expectations are communicated to participants during the respective workshops.

## Our Approach to Programs

ODI's programs aim to change practices at work to improve organisation results; our PEAR approach is used to achieve this aim and is the minimum standard applied to all deliveries:

### Preparatory work by participants:

Prior to the workshop, participants complete a small task to start the learning process and to prepare them for the workshop.

**Experiential learning:** Our facilitator delivers an experiential workshop, which exposes participants to new tools and methods to be applied at work. The workshop is supplemented by a workshop manual for future reference.

**Application support:** Participants use our Workplace Application Tool during the workshop to plan for the application

of new learning at work. They then complete the application cycle back at work by sharing and implementing their plan, then reflecting on what happened. In the case of Coached Custom Courses, application support also includes coaching with a line manager or external coach. The focus of this coaching is to accelerate the adoption of new skills and behaviours at work, typically in line with mutually agreed individual leadership development plans.

**Review:** Participants complete a paper-based workshop exit survey as to their level of satisfaction, learning and their confidence and commitment to apply what they have learned (Kirkpatrick Levels 1 and 2). Participants also complete an online review one month after the workshop as an opportunity for reflection, to evaluate individual learning and its application at work (Kirkpatrick Levels 2 and 3), and the contribution they have made to organisation results (Kirkpatrick Level 4), with all survey results reported back to participants' organisations. This is our end-of-program survey.

## Measurement and Results

The 138 programs analysed comprised 27 Public Short Courses, 73 Custom Courses and 38 Coached Custom Courses. We used a consistent question set across the exit surveys and post-program surveys, enabling us to reliably aggregate the quantitative data.

### Level 1 - Reaction and Level 2 - Learning

Questions were asked to capture reaction, learning, confidence and commitment. We found higher levels of positive reaction in the workshop exit survey where there is to be less application support and activity expectation in the post-workshop period; with Public Short Courses scoring highest and Coached Custom Courses scoring lowest.

The confidence and commitment about application as recorded in the workshop exit surveys is highest where

the application support and application expectations are to be lowest; with Public Short Course participants recording highest confidence and commitment.

### Level 3 - Behaviour

Questions were asked about new practices adopted at work post-workshop, with specific instances recorded qualitatively to validate the responses.

The results indicate an improved application of new skills and behaviours in the post-workshop period as the level of application support increases. New skills and behaviours applied, as reported in the post-program surveys, is not materially different for Custom Courses from Public Short Courses and is 94% higher for Coached Custom Courses. We attribute this to the strongly positive impact of individual coaching on application effort.

### Level 4 - Results

Questions were asked about the impact of application of new skills and behaviours on program-specific lead indicators of organisation results improvement, with specific impacts recorded qualitatively to validate the responses.

We found improved results in the post-workshop period as the level of application support increases. Improved results achieved, as reported in the post-program surveys, is 133% higher for Custom Courses than Public Short Courses and is 466% higher for Coached Custom Courses. Coached Custom Course participants report results contribution as 243% higher than (non-coached) Custom Courses.

We attribute this to the strongly positive impact of individual coaching on purposeful application of new skills and behaviours; ie the participant clearly understands the improved results achievable by practice changes.

### Using Kirkpatrick Evaluation

Kirkpatrick Evaluation works best when it is integrated into programs from the design stage; causing results and required skills/behaviour changes to be front and centre before development

and delivery take place. It also enables evaluation processes to be integrated into the program from the outset.

Level 1 and 2 evaluation is easy to do and is often overdone. Invest more into Level 3 and 4 evaluation.

Kirkpatrick Evaluation history tells us that achieving application effort and success after the workshop is the weak link in the chain. Application support needs to be well planned and resourced.

### Conclusions

In workshop exit surveys, Level 1 and 2 scores are highest for events for which application support and application expectations will be lowest. We conclude that the 'happy sheet' effect is in play here. This means that participants are so happy to leave the workshop without any application obligation or expectation that they over-score the workshop experience itself.

Public Short Course and Custom Course participants score high because, for them, there is little or no further effort required of them. Coached Custom Course participants score more conservatively because they feel an accountability at the end of the workshop for further input into the program.

Post-program surveys capture increased Level 3 scores as application support and expectations increase. These are scores based on actual application activity. We conclude they establish that application activity is almost doubled by provision of effective personal application support, in our case through line manager or external coach engagement in the application process.

Post-program surveys capture increased Level 4 scores as application support and expectations increase. These are scores based on actual contributions towards organisation results from the enhanced Level 3 activity. We conclude they establish that results contribution from Public Short Courses is so low that they are to be avoided by organisations that have the scale to support custom deliveries.

We conclude also that the value

coaching adds to Custom Courses, doubling application activity and increasing results contribution by two and a half times, means that custom deliveries without coaching are best avoided; that individual workplace coaching should be a core design element for all custom deliveries.

We conclude that the ability to measure Level 3 and 4 outcomes and use them to improve program design and delivery is quite powerful in proving the value of training. In our experience Kirkpatrick is a worthy tool to help us prove the value of training.

As a result of this review project we have: ceased to provide Public Short Courses, as we think they do not deliver adequate value; invested in developing tools to help our client organisations specify their Level 3 and 4 expectations and measures during program design and expanded our range of reflective practice tools to support participant application activity.

We have also engaged participant line managers in our programs by inducting them, supporting their coaching capability (including coaching skills training), and sourcing Level 3 and 4 observations from them and incorporated facilitated group video conferences for participants two weeks after a workshop to share application experiences and further stimulate that activity, and built a substantial database of evaluative information against which we can benchmark all future ODI programs.

**Kyran Newell** and **Nicky Trainor** are Directors of Organisation Development Institute, a New Zealand provider of business training and business consultancy. Kyran has extensive experience in senior leadership and management roles. Nicky has an extensive background in tertiary teaching and management. Both authors are Silver Certified in Kirkpatrick Four Levels® Evaluation. Contact via [odi.org.nz](http://odi.org.nz)