POLISHING YOUR gems

BY IRENE STERN FRIELICH

Have you ever gone on a treasure hunt or maybe seen one in the movies? The seeker searches for a treasure chest—usually meeting challenges along the way. Eventually the seeker locates the elusive treasure chest, but not all its contents are gleaming. There is some culling to do, and some polishing, before being ready to present the gems to the funders of the treasure hunt.

As learning and development professionals, we often are sent on a mission and are expected to bring back treasures, often through a request for training. We search and analyze—usually attending to challenges along the way. Imagine multiple competing priorities, regulatory controls, and lean resources, all of which affect successful learning and behavior change on the job and our ability to measure the change, if we even evaluate it. According to the 2016 ATD Research report *Evaluating Learning: Getting to Measurements That Matter*, only about one-third of those surveyed measure business impact.

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podcast

Illuminate the value of a training program with this step-by step method for creating an evaluation plan.

Once we find the treasure (the learners have learned something and altered their job performance in a way that supports organizational goals), what culling and polishing (evaluation analysis) needs to be done so we can clearly see the value of our treasure before presenting findings to our stakeholders? Let's walk through that process.

Where's my treasure map?

The first thing you need for a treasure hunt, of course, is a treasure map. Without a map, how do you even know what to look for or where you might find it? As L&D professionals, we draw this map ourselves as we conduct our needs analysis (the A in ADDIE) and prepare the design document. That design document includes our plan for evaluating the outcome of our learning solution. When we confirm our analysis with the stakeholders, we also can confirm the evaluation plan.

Unfortunately, many L&D professionals create their evaluation plan after the training is delivered. Imagine receiving a treasure map after you've finished your hunt. It's too late, and you won't know what you should have been looking for or if you found it.

Three categories of questions can help you build your evaluation plan during analysis: organizational impact, job performance impact, and learning impact. The questions presented here are just a few you would use in a complete needs analysis.

Organizational impact: What is the value of the treasure chest?

Collecting data about the organization's goals and where the organization is falling short (the gap) is a first step. Often we are given a directive to develop a training course to fix something. It is part of our job to back up and find out about the bigger picture. Here are some sample questions you can use to elicit this information, with sample responses for a course request on workplace ergonomics in italics:

- How does this project support the organization's goals? *By reducing costs related to workplace injuries and interventions: There is a high cost associated with accessing the on-site nurse to provide a site evaluation and there is the additional cost of preventable ergonomics-related workplace injuries.*
- What is driving this request or identification of this issue? *The nurse has reported he cannot keep up with the site evaluation demand, especially given his other, high-priority job responsibilities. Sometimes additional nursing resources are needed, costing the organization $25,000 per year on average.*
- How will solving this problem support the organization's goals? *It might reduce workplace injury and increase productivity via less lost work time and fewer worker's compensation issues.*
- What do we need to be able to show as an outcome of our efforts? Where can we obtain this data now and after the training solution? *Fewer complaints related to workstation discomfort (complaint log maintained by nurse), freed up time for the nurse to focus on and complete high-priority job requirements (work log maintained by nurse), reduced cost of additional nursing resources (budget line item), reduced cost of absence due to workplace injury (only tracked as reported to HR), fewer worker's comp claims due to preventable ergonomic-related injuries (HR reports).*

You might recognize that many of these questions relate to Kirkpatrick's fourth level of evaluation (business impact) and the Robinsons' Performance Consulting model (need hierarchy/business needs).

Job performance impact: What are the gems in the treasure chest?

Next we find out what behavior, or performance, changes are needed and by whom. Here are some sample job performance questions you can ask:

- Who are the people who need to perform? *Anyone who sits at a desk or works in a lab, in multiple work sites.*
- What job performance changes (that support the business goals) can reasonably be addressed via a learning solution? *Learners can self-adjust their workstations and*

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practices, eliminating the need to call the nurse unless the adjustments don't help.

- How will we know job performance has changed? What will we see and hear to let us know we've been successful? *People sitting properly in their workstations, fewer complaints, fewer nurse site visits.*
- What measures are currently in place to track this performance? How can we access these measures? *Monthly reports are generated regarding calls to the nurse as well as health-related complaints, all by topic. These can be provided upon request.*
- What additional measures do we need? How can we obtain before and after results? *Baseline and follow-up surveys or interviews focusing on behavior change, as well as confidence with ergonomics-related issues.*

Learning impact: How do I get to the treasure chest?

Once we've identified the business goals and gaps, and the job performance that supports closing those gaps, we can begin to dig deeper and define the learning requirements. Here are some more sample questions:

- What must be learned during the training program so that performance changes? *How to make pertinent ergonomic adjustments based on the specific equipment the individual uses.*
- How will we know that the learning took place? *A quiz at the end of the course. Random checks on-site immediately after completing the course.*
- What do learners' managers need to be able to do to support and reinforce the learning? *Check in to ensure learners completed the course, made adjustments, and correctly answered questions based on the course, or consulted with a nurse if needed.*

Starting with these sets of questions as part of our needs analysis and planning our evaluation strategy during the analyze phase of our work helps ensure we know where to locate the treasure chest, which gems we are seeking, and what kind of polishing we need to do to reveal their value.

How can I deal with the bounding boulders?

Having a plan is essential. But we all face challenges that could derail our plan. So, anticipating those challenges and identifying ways to manage them helps. Some typical reactions our team encounters when we plan to measure job and organizational impact include: "We don't have time or people to locate the data and run the numbers," "We don't have funds to do a complete evaluation project," and "We already know we need this training, so there's no need to spend time measuring."

Sometimes our stakeholders tell us they intuitively know the learning solution is worthwhile and believe there are other, higher priorities than measuring the results. This is a place L&D professionals can position themselves as consultants in their organizations.

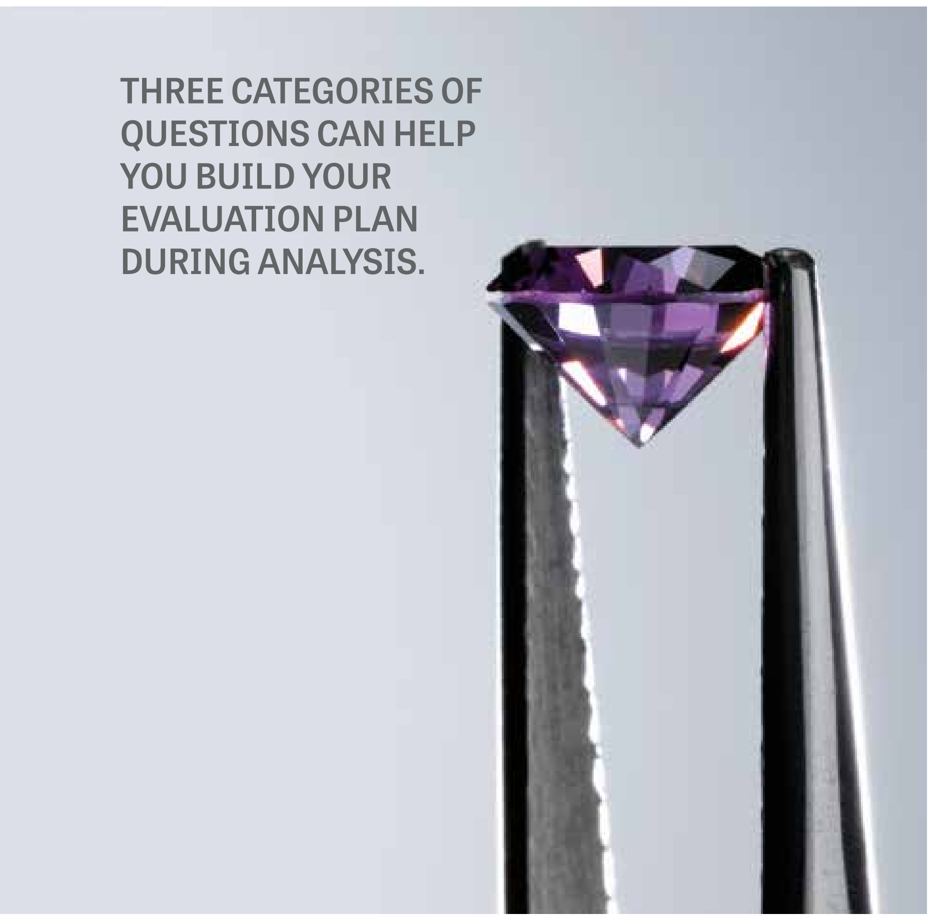
Try asking, "How much time/funding would you be willing to give to this?" or "Would it help you get more budget (or other value) in the future if we could demonstrate the positive impact of this training?" Also, based on the needs-analysis questions, you might identify

several ways you can pull before and after data with little additional effort.

In our example, we found there is a nursing call log with easy-to-access reports already in place that can provide some of the data we need. By asking questions that reveal organizational goal and performance measures currently being used, you can recommend approaches that save the organization significant time and expense.

Is the treasure hunt worthwhile?

At the same time, think about the payoff in making an effort to polish the gems. Is your particular gem so difficult to access that it's not worth the effort? Let go of it; you can spend your time more wisely pursuing gems in a different treasure hunt. If training is required for compliance reasons and the organization cannot legally function without it, conducting a comprehensive evaluation may not be the best use of your time.



Collecting and polishing the gems

You have an evaluation plan in place, you've collected baseline data, and you've launched your solution. Now it's time to start collecting the post-launch data and analyzing it. This can take many months, even years, for culture-changing solutions. For our ergonomics sample, we might do the following:

- Obtain reports that already exist to compare statistics before the learning launch and quarterly thereafter to determine the number of nurse site evaluation requests and visits, worker's compensation–related claims due to preventable ergonomic-related injuries (if those are readily available), and work time lost due to preventable ergonomic-related injuries.
- Conduct post-launch interviews or surveys with employees that compare their pre-launch responses to questions about making ergonomic adjustments and comfort at their workstation.
- Collect information from managers via post-launch interviews or surveys that ask about their employees' successful implementation of ergonomics adjustments.

The final step is to calculate a value—organizational results and, when possible, monetization of the results—from the before and after reports and employees' anecdotes about the benefits of the learning solution. Then, communicate these findings to the key stakeholders to demonstrate the value and positive impact on the organization as well as the individuals. In our ergonomics example, the goal is to show reduced costs related to workplace injuries and interventions, including the cost of the nurse's site visits.

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