

Information Note

Training and Development

Evaluating Training and Development

In order to evaluate the effectiveness of training and development provision it is important to have thoroughly completed the earlier stages of needs analysis and planning. In particular the evaluation should refer to the following:

- Clearly identified need linked to work objectives
- Identified Learning Objectives
- Anticipated Outcomes (impact)
- Details of the plan (methods, resources, timescales)

All the above would apply regardless of whether the evaluation is of the organisation wide training and development plan, or those for teams or individuals – these are the measures against which you will assess the effectiveness of the training and development.

It is important to establish success criteria and consider how this will be measured at the point of designing the training intervention and not as an after thought.

Monitoring of Training and Development Provision

Monitoring needs to be a continuous process that can be fed into the overall assessment and evaluation, but that can also assist changes in direction if specific training and development initiatives are not providing the desired results.

1. **Before** receiving training and development from individual and their line manager on what they hope to get out of it (e.g. use questionnaires)
2. **During and immediately after** receiving the training and development (what worked, what didn't, why, what actions have been planned for putting the new knowledge or skills into practice and on what timescale)
3. **Short-term impact** – 3-6 months after completion (have the actions identified in 2.

above been achieved, if not why not, what do they now feel about the training and development provision)

4. **Longer term impact** – 6-12 months after completion (as for 3. above, plus what difference has it made in terms of the overall learning objective and the performance of the work)

Developing Measures for Evaluation

The critical measure of the effectiveness of training and development will be, did it meet the objective and did it deliver the anticipated outcome.

It is often difficult to quantify the impact of training interventions on the performance of an organisation. However, by looking at qualitative elements and using softer measurements, evidence can be obtained.

Quantitative

- **Quantity of work/improvements** in productivity or efficiency of delivery. Has the training produced measurable improvements?
- **Numbers of people** receiving training and development. Proportion of your workforce receiving training and development.
- **Equality/diversity profile** of those receiving training and development. Is your training and development provision accessible and equal or are particular groups receiving better opportunities? If so is there good reason why particular groups or learning themes are being targeted and has that been communicated?
- **Team/seniority/location profile** – is training and development spread across the organisation in a manner that is fair and also targets the areas of need appropriately? Are your training and development opportunities being taken up adequately across the whole organisation or are specific functions, departments or locations receiving better or more opportunities? If so what is the reason?

- **Analysis of costs** (e.g. calculations of cost per head, function, seniority, type of provision, relationship to priority objectives, costs in relation to other areas of relevant expenditure – e.g. recruitment, pay). This will be helpful when considering added value, budgets, cost effectiveness

Qualitative

- **Assessment of change/movement** in the organisation's achievements since the training and development initiatives were implemented (e.g. improvements in areas originally identified as weaknesses)
- **Stakeholder feedback** (e.g. questionnaires, focus groups, interviews), from staff, managers, customers and other stakeholders. Are stakeholders seeing changes or improvements in relation to the areas identified for development?
- **Learner feedback** (e.g. questionnaires, PDPs, informal feedback) from learners and line managers on the training and development they have received (e.g. quality, relevance, ability to put into practice, whether met personal objectives).

Methods of Obtaining Feedback

Questionnaires

Questionnaires provide a relatively easy way of getting feedback on training and development. However, it is important to ensure that you are asking the right questions and that you have the resources to collate and analyse the responses.

It is common practice to ask participants on training events to complete an initial assessment at the end of the session, sometimes known as "happy sheets". These gauge feeling on the day but do not provide insights into how effective the learning will be in the longer term and whether in fact it will be put into practice at all.

Follow-up questionnaires some time after the event can help illicit more detailed information about transfer of learning into the workplace and offer opportunities to feedback and discuss the overall effectiveness of the intervention.

More widely, staff engagement survey's can be used to help understand the bigger impact of training and development interventions ie not simply whether specific learning objectives and outcomes have been met, but on overall motivation and engagement of staff which has a direct impact on performance and staff retention.

Interviews and Focus Groups

Interviews (one-to-one) and focus groups provide a more open-ended opportunity to probe more deeply into the difference that training and development has made, and why it worked or didn't work. However, the outcomes will not necessarily fit a neat set of indicators as application of learning will be highly individual with possible spin-off issues arising.

Existing Sources of Information

Don't forget that, as for the initial training needs analysis, there will be a number of existing documents and sources of information within your organisation that you can use. E.g.:

- Performance Review/Appraisal (in particular learning over the previous year and next year's personal development plan)
- Customer or staff surveys (and any changes since last conducted)
- Assessments of work/projects/activities (and any changes since last conducted)

Monitoring and evaluation are a critical part of ensuring that you are getting the best out of your training and development provision. However, try to keep it simple and focused so that you don't get overwhelmed by too much data and insufficient clarity!

The purpose of monitoring and evaluation is purely to check whether the training and development is improving performance and making the right kind of difference to your organisation, your staff and your stakeholders.

Training Needs Analysis

It is important to analyse learning needs in both a top down and bottom up way.

Looking at the bigger picture

There can be a tendency to provide training and development opportunities in a reactive and ad hoc fashion, responding to individual or team requests as and when they arise.

When looking at your organisation's training and development needs it is important to take a more strategic approach, including looking at organisation wide needs and taking account of the following contextual factors:

- Organisational Mission/Vision and Objectives (long and shorter-term goals, targets)
- Organisational Culture (actual and desired ways of working and relating)
- External influences on the organisation and its work (e.g. changes in legislation, funding environment, partnerships)
- Organisation's Planning and/or Performance Management Cycle (identification of cascaded down objectives and timescales for achievement)

These provide the bigger picture that ensure training and development provision links directly into the organisation's ability to deliver on its Mission, Values and Objectives in the immediate and longer term rather than focusing narrowly on individuals.

It is likely that some learning and development needs will be identified at the organisational level either for all staff (e.g. induction) or for specific groups (e.g. management and leadership training).

Identifying the training and development needs

Having looked at the bigger picture you are ready to identify the training and development needs, considering the following factors:

- What does your organisation currently do well?
- What are the areas for improvement?
- How well does this match the mission/vision, values and objectives?
- How well does this match with changes in the external environment?
- What new knowledge, skills and behaviours are required to meet your mission/vision, values and objectives (organisation, team and individual)?

You can use existing internal resources such as:

- Evaluations and assessments of project work/activities
- Performance Review/Appraisal (especially Performance Development Plans)
- De-briefings and Exit Interviews
- Job Descriptions and Person Specifications (especially the knowledge, skills and behaviours within the latter)

In addition you may want to hold individual interviews or facilitated group discussions to look more precisely at anticipated training and development needs.

You will then have an overall sense of needs at an organisational level, at department or work unit level and at an individual level.

Once this data has been collated it is possible to draw together an overall training and development needs analysis for your organisation.

To do this analysis well, it helps to encourage an organisational culture of openness, where learning is shared, lessons are learnt, people are not afraid to name weaknesses, and people are not shy of claiming successes and strengths.

Training and Development Plans

Developing a training and development plan

The approach to developing a training and development plan should be as for any other type of strategy and planning within an organisation and involves identifying and specifying the following:

- Learning needs (organisation, team and individual)
- Learning objectives (organisation, team and individual)
- The top priorities (a short-list of achievable priority areas)
- Anticipated performance outcomes (organisation, team and individual)
- Specific training and development activities and methodologies to support delivery
- Opportunities to put the learning into practice
- Resource requirements (money, providers, people)
- Timescales
- Methods of monitoring and assessment against objectives and outcomes and ensuring value for money

Additionally it is useful if this is underpinned by an understanding of different learning styles generally and specifically in relation to the actual learners within your organisation. This will support your selection of appropriate activities and methodologies. (For more information see our separate other Information Notes

www.peopleinaid.org/resources/publications.aspx)

Monitoring and assessment

Monitoring and assessing the effective implementation of the training and development plan needs to be an ongoing process throughout delivery, as well as a part of the cycle to inform the development of future training and development planning.

Should the monitoring and assessment highlight problems these need to be acted on promptly rather than waiting for the next planning cycle.

The Training and Development Cycle



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