Contents

Foreword by Don Kirkpatrick *ix*
Foreword by Elaine Biech *xi*
Preface *xvii*

Part 1: Basics of Evaluation **1**

Chapter 1: Reasons for Evaluating **3**
The Urgent Need to Create and Demonstrate Training Value 3
Three Reasons to Evaluate Training Programs 5
Summary 8

Chapter 2: The New World Kirkpatrick Model—An Overview **9**
The Four Levels 9
The New World Kirkpatrick Model 10
The Four Levels in Reverse 11
Summary 18
References 19

Chapter 3: Developing an Effective Evaluation Strategy **20**
A Cautionary Tale 20
Not All Programs Are Created Equal 21
Three Phases of a Program 22
Training Is Like Flying a Plane 31
Summary 32

Chapter 4: The Kirkpatrick Foundational Principles **33**
Kirkpatrick Foundational Principles 33
Summary 36

Part 2: Data Collection Guidelines, Methods, and Tools 37

Chapter 5: Evaluating Level 1: Reaction 39
Methods, Tools, and Techniques 39
Timing 41
Keep It Simple 41
Summary 41

Chapter 6: Evaluating Level 2: Learning 42
Methods, Tools, and Techniques 42
Timing 47
Summary 48

Chapter 7: Evaluating Level 3: Behavior 49
Research on the Importance of Post-Training Support 49
Defining the Few, Critical Behaviors 50
A Few Words About Competencies 52
Methods, Tools, and Techniques 53
Timing 58
Summary 59

Chapter 8: Evaluating Level 4: Results 60
Identifying Leading Indicators 60
The Benefits of Identifying Leading Indicators 63
Methods, Tools, and Techniques 63
Timing 65
Summary 66

Chapter 9: Evaluating Beyond Traditional Classroom Training 67
How to Evaluate E-Learning 67
How to Evaluate Informal Learning 76
How to Evaluate Mobile Learning 80
Summary 85

Chapter 10: Evaluation Instrument Creation Basics 86
Typical Questions 86
The Key to Success 87
Summary 94

Chapter 11: Blended Evaluation® Items and Sample Tools 95
The Blended Evaluation® Approach 95
Using Learner-Centered Items 96
Sample Methods and Tools 97
Item Library for Use Immediately Following Training 110
Item Library for Delayed Use After Training 112
Summary 116

Part 3: Data Analysis and Reporting Basics 119

Chapter 12: Making Data-Based Decisions 121
Three Key Data Analysis Questions 121
Summary 126

Chapter 13: Using the Success Case Method to Drive Performance and Results 127
Defining Success 128
Training Evaluation Realities 128
Summary 134

Chapter 14: So What? Now What? 135
The Questions That Need to Be Answered 135
A Business Person's Criteria 136
PDCA Cycle 136
What Management Wants to Know 137
Outputs Versus Outcomes 138
Summary 140
References 141

Chapter 15: Reporting Progress and Demonstrating Program Value 142
Sharing Training Outcomes 142
Reporting Program Progress 143
Making an Impactful Final Report 145
Summary 147

Chapter 16: Avoiding Common Evaluation Pitfalls 148
Pitfall #1: Addressing Evaluation Requirements After a Program Has Launched 148
Pitfall #2: Viewing All Training Programs as Equal 149

Pitfall #3: Spending the Majority of Your Training Evaluation Resources on Levels 1 and 2 150
Pitfall #4: Relying Solely on Standardized Surveys 151
Pitfall #5: Asking Questions That Don't Generate Useful Data 151
Pitfall #6: Making Evaluation Too Complicated or Academic 152
Pitfall #7: Not Using Collected Data 152
Summary 154
References 154

Part 4: Case Studies 155

Chapter 17: Common Practice in Leadership Program: Greencore Northampton 157

Stakeholder Expectations 157
Program Structure 158
Evaluation Methods and Tools 160
Results of Pilot 164
Summary 166

Chapter 18: Service Over and Above the Rest (SOAR) Program: Emirates Airline 167

Actions 169
Pre-SOAR Preparation 169
SOAR and Coach for Performance Formal Training 169
Formalized on-the-Job Support 170
The Evaluation and Reward Strategy 170
Results 171
Summary 173

Chapter 19: Sales Graduate Program Pilot: ArjoHuntleigh Getinge Group 174

Business Need and Program Intent 174
Stakeholder Expectations 175
Project Methodology 175
Evaluation Approach 176
Key Level 3 Findings 186

Key Level 4 Findings 187
Success Factors 189
Recommendations 189
Summary 190

Chapter 20: Accident Reduction Program: Maryland Transit Administration 191
Project Methodology 192
Required Drivers 193
Evaluation Methodology 193
Key Findings and Results 200
Program Success Factors 203
Barriers to Success 203
Summary 204

Chapter 21: Coaching Program: IHC New Zealand 205
Stakeholder Expectations 206
Critical Behaviors 206
Project Methodology 206
Evaluation Methods 207
Key Findings and Results 210
Success Factors 214
Barriers to Success 214
Recommendations 216
Summary 216

Call to Action 218
Your Personal Action Plan 219

References 221
About the Authors 223
About the Contributors 225
Index 229