

Models for Evaluating Learning Interventions

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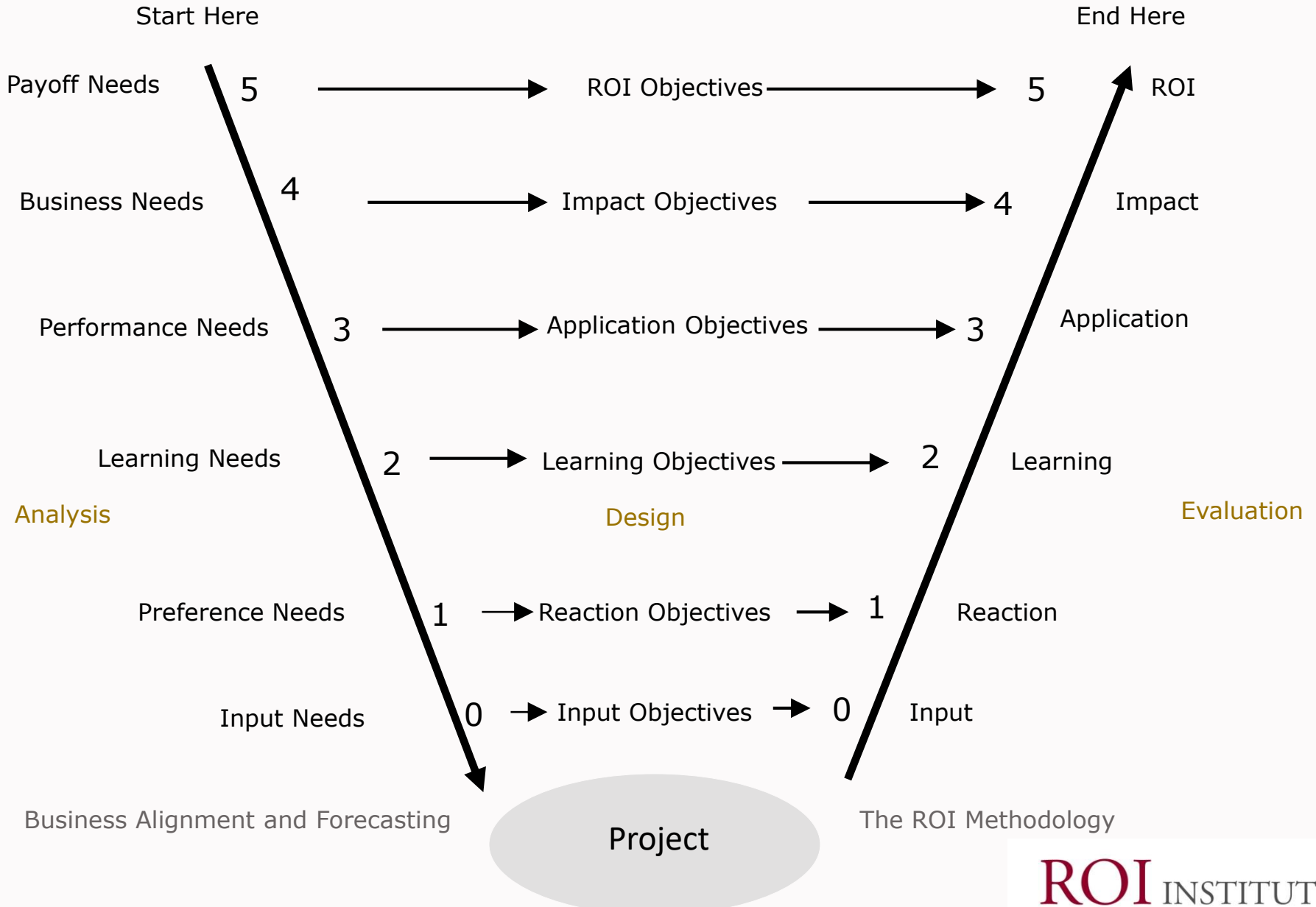
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Levels of Evaluation

- Level 0 - Inputs
- Level 1 - Reaction
- Level 2 - Learning
- Level 3 - Application (Behaviour)
- Level 4 - Business Impact (Results)
- Level 5 - Return on Investment

NB: For a comprehensive evaluation, a Level 5 evaluation should be conducted.

Business Alignment



Levels of Evaluation	Measurement Focus	Typical Measures
5. ROI	Comparison of monetary benefits from programme to programme costs	Benefit-Cost Ratio (BCR), ROI%, Payback Period
4. Impact and Consequences	The consequences of the use of the content and materials expressed as business impact measures	Productivity, Revenue, Quality, Time, Efficiency, Customer Satisfaction, Employee Engagement
3. Application & Implementation	Use of content and materials in the work environment, including progress with actual items and implementation	Extent of use, Task completion, Frequency of use, Actions completed, Success with use, Barriers to use, Enablers to use
2. Learning & Confidence	Learning to use the content and materials, including the confidence to use what was learned	Skills, Knowledge, Capacity, Competencies, Confidence, Contacts
1. Reaction & Perceived Value	Reaction to the project or programme, including the perceived value	Relevance, Importance, Usefulness, Appropriateness, Intent to use, Motivation to take action
0. Inputs and Indicators	The input into the project in terms of scope, volume, efficiencies, costs	Participants, Hours, Costs, Timing

5 Levels of Measurement - Examples

Level 0 Input and Indicators

- Number of programmes
- Participants
- Hours
- Costs
- Time to Deliver

*Correlates with Application

Level 1 Reaction and Planned Action

- Relevance*
- Importance*
- Usefulness
- Appeal
- Emotion
- Brevity
- Uniqueness
- New Information*
- Motivation
- Appropriateness
- Intent to Use*
- Would recommend*

5 Levels of Measurement - Examples

Level 2 Learning

- Information
- Knowledge
- Understanding
- Capability
- Contacts
- Confidence
- Perceptions
- Skills

Level 3 Application

- Use of Information
- Use of Knowledge
- Use of Skill
- Completion of Actions
- Completion of Tasks
- Implementation of Ideas
- Following the Policy
- Use of Procedure
- Use of Regulation
- Success with Application
- Barriers
- Enablers

5 Levels of Measurement - Examples

Level 4 Business Impact

- Productivity
- Quality
- Sales
- Errors
- Incidents
- Re-Work
- Efficiency
- Compliance Discrepancies
- Citizen Complaints
- Costs
- Employee Engagement
- Employee Retention

- Service Delivery
- Cycle Time
- Customer Satisfaction
- Intangible Measures

.... includes a technique to isolate the effects of the project.

Level 5 Return on Investment

- ROI (%)
- Benefit/Cost Ratio
- Payback Period

The ROI calculation is simple.

$$\text{BCR} = \frac{\text{Programme Benefits}}{\text{Programme Costs}} = X:1$$

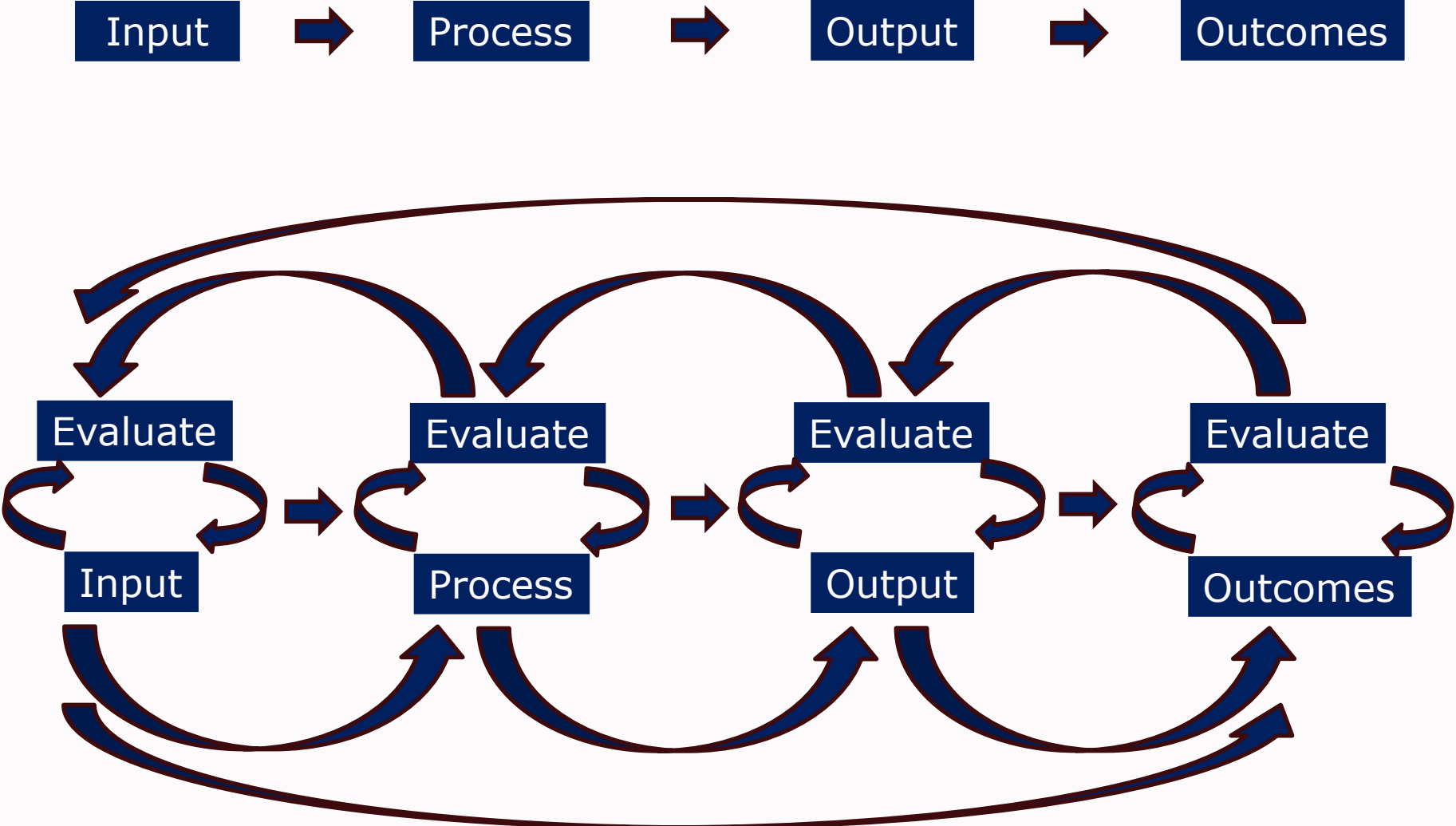
$$\text{ROI} = \frac{\text{Net Programme Benefits}}{\text{Programme Costs}} \times 100$$

$$\text{PP} = \frac{\text{Programme Costs}}{\text{Programme Benefits}} \times 12$$

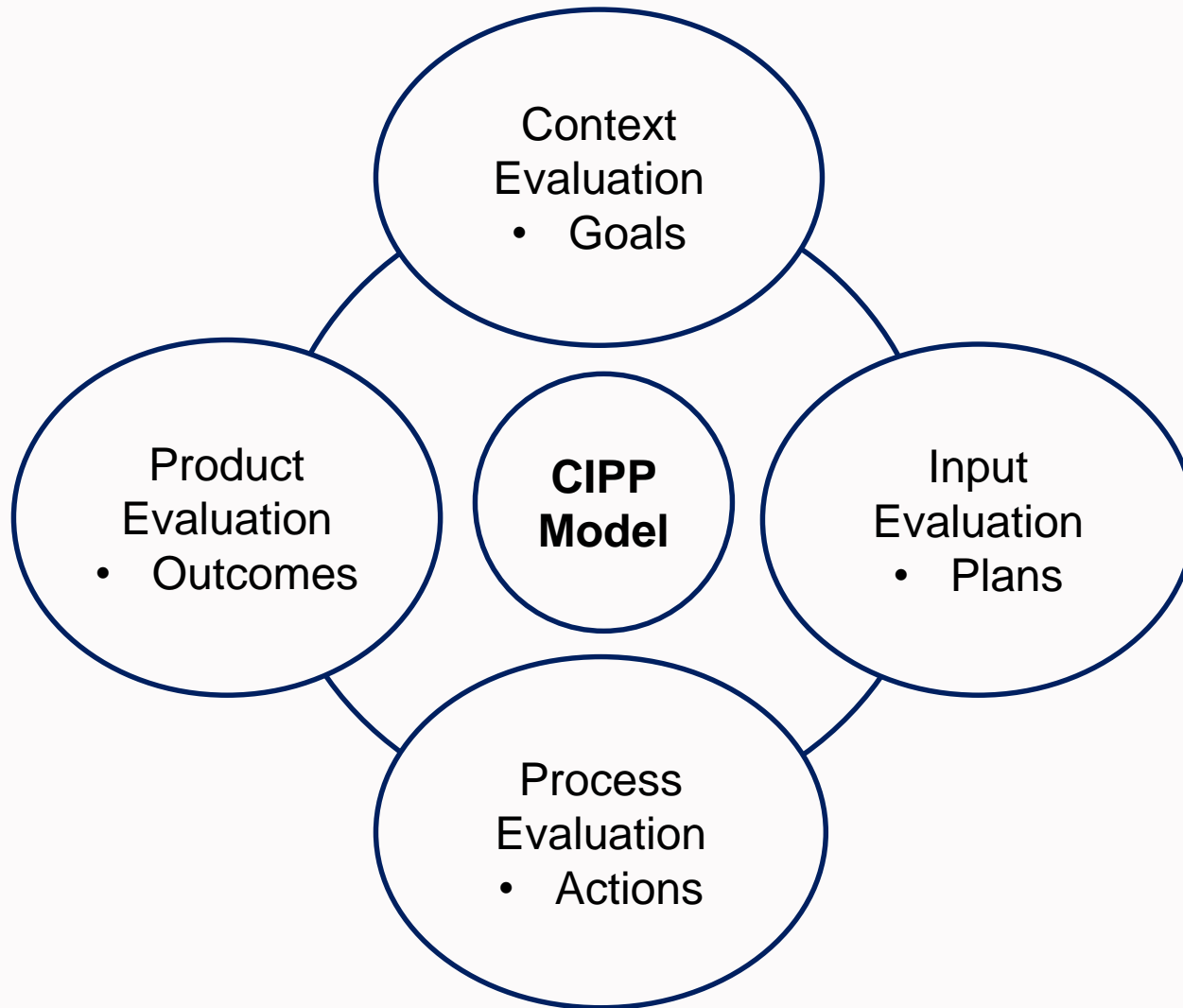
Kaufman's Five Levels of Evaluation

Kaufman	Kirkpatrick	Explanation
Input	1a	<i>Resource availability and quality</i> These are training materials, digital resources etc., used to support the learning experience.
Process	1b	<i>Process acceptability and efficiency</i> This is the actual delivery of the learning experience.
Micro	2 and 3	<i>Individual and small group payoffs</i> This is the result for the 'micro-level client' (normally the learner). Did the learner 'acquire' the learning? Did he or she apply it on the job?
Macro	4	<i>Organizational payoffs</i> This is the result for the 'macro-level client', the organization, and includes evaluation of performance improvement and cost benefit/cost consequence analysis.
Mega	n/a	<i>Societal contributions</i> This is the result for the 'mega-level client', either society as a whole or a company's clientele.

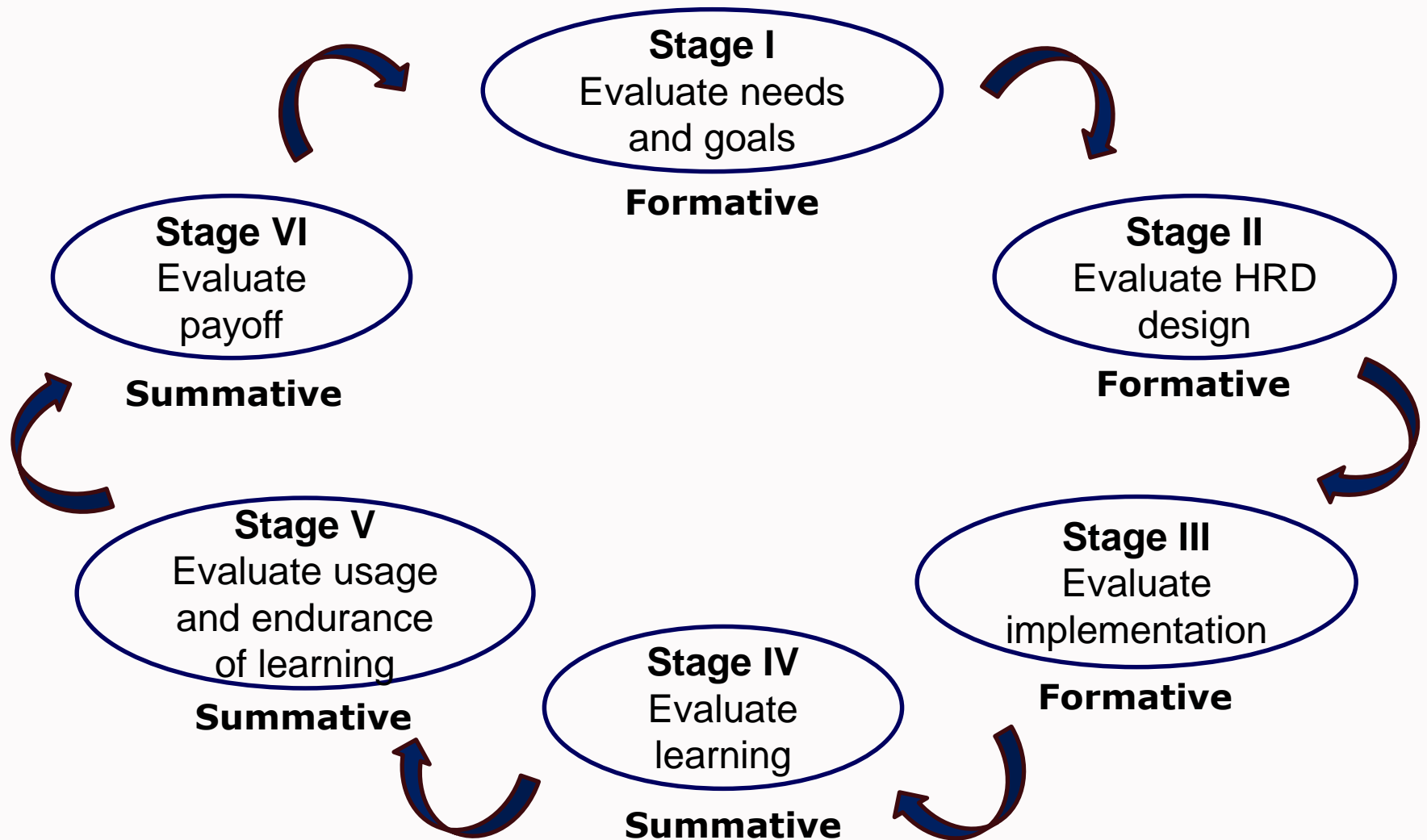
Bushnell's Systems Approach to Evaluation



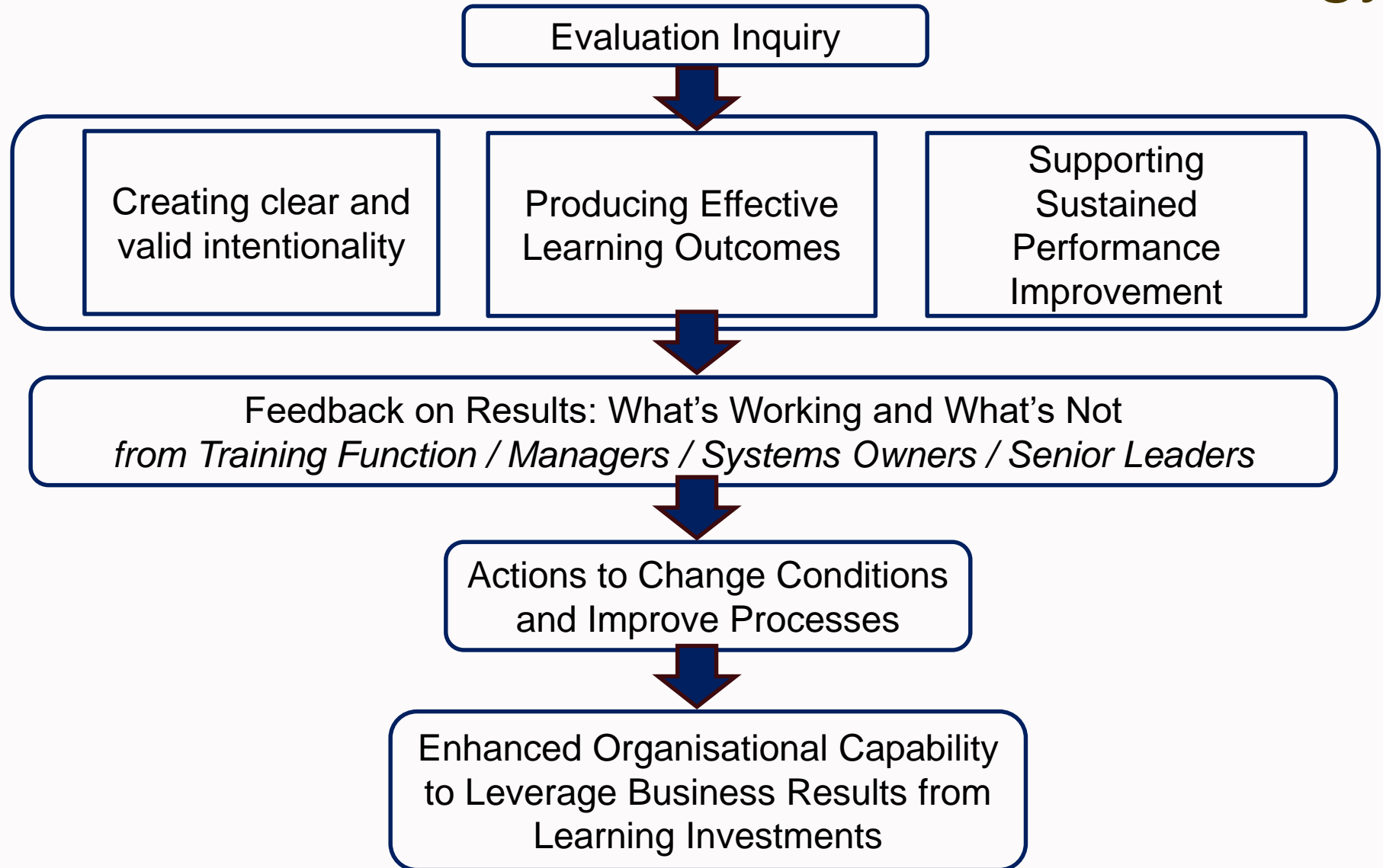
Stufflebeam CIPP Evaluation Model



Brinkerhoff Six-Stage Model



Brinkerhoff Success Case Model Strategy



Anderson's Value of Learning

	Senior management trust in the learning contribution ∨	The organization requires learning value metrics ∨
Emphasis on the short-term benefits }	Learning Function Measures	Return on Investment Measures
Emphasis on the long-term benefits }	Return on Expectation Measures	Benchmark & Capability Measures

[https://researchportal.port.ac.uk/portal/en/publications/the-value-of-learning-from-return-on-investment-to-return-on-expectation\(803cf546-d2af-40ea-bf23-20651a537805\)/export.html](https://researchportal.port.ac.uk/portal/en/publications/the-value-of-learning-from-return-on-investment-to-return-on-expectation(803cf546-d2af-40ea-bf23-20651a537805)/export.html)

“Original” Kirkpatrick Four-Level Model

Level 1	Reaction	To what degree did the participants react favorably to the training
Level 2	Learning	To what degree did the participants acquire the intended knowledge, skills, and/or attitudes based on their participation in a training
Level 3	Behavior	To what degree did the participants apply what they learned during training to his/her job
Level 4	Results	To what degree did the targeted objectives or outcomes occur as a result of the training

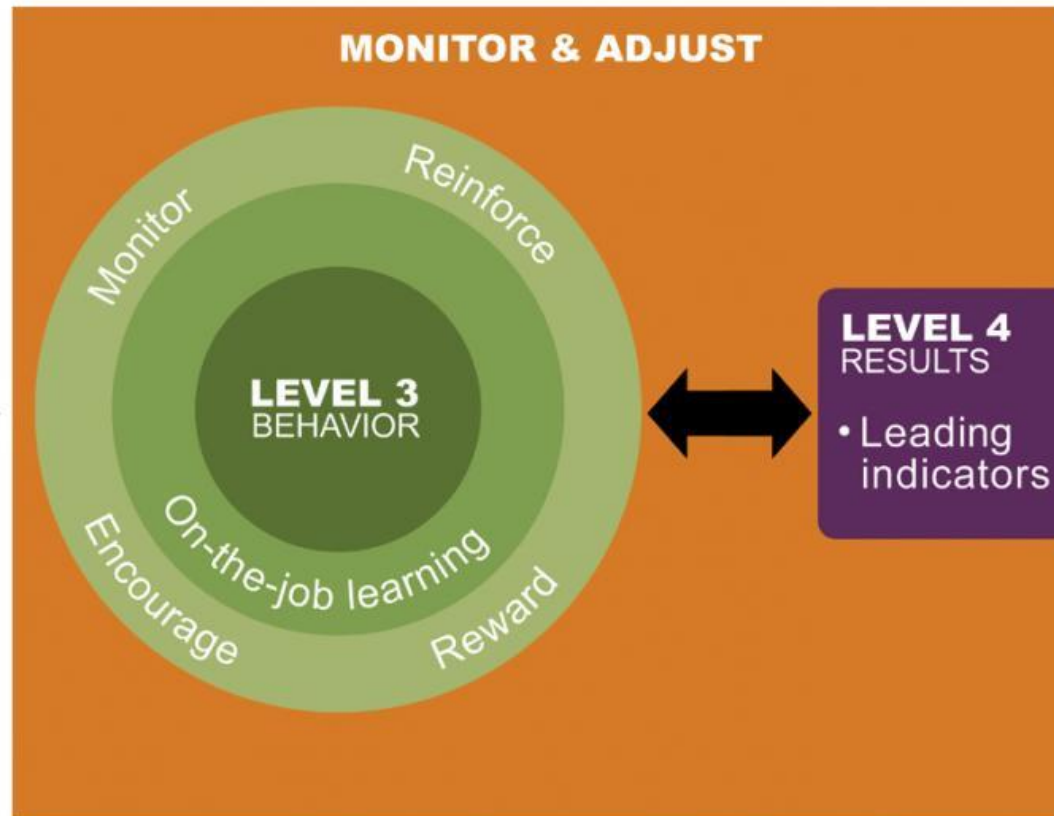
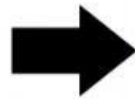
THE NEW WORLD KIRKPATRICK MODEL

LEVEL 1 REACTION

- Engagement
- Relevance
- Customer satisfaction

LEVEL 2 LEARNING

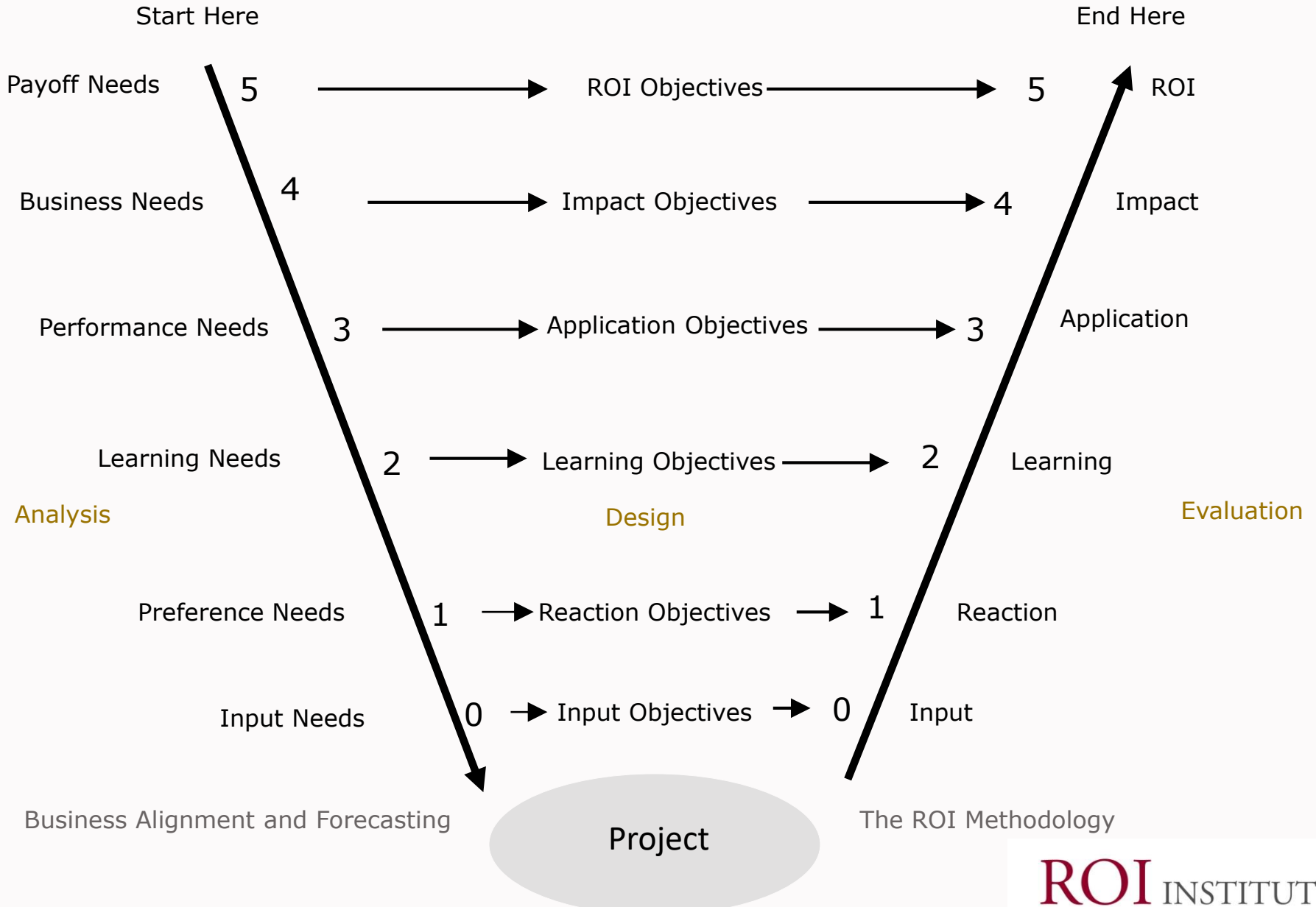
- Knowledge
- Skills
- Attitude
- Confidence
- Commitment



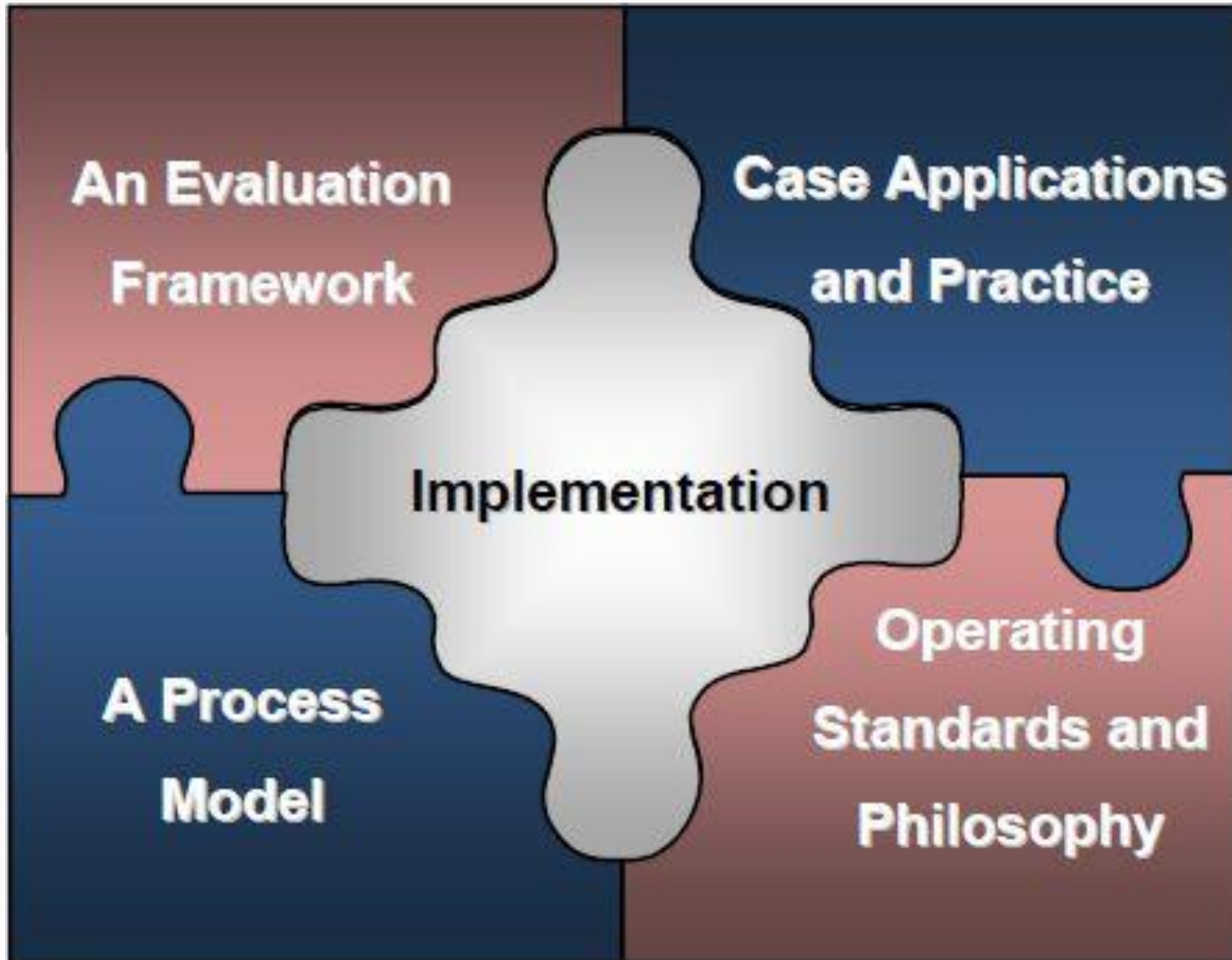
LEVEL 4 RESULTS

- Leading indicators
- Desired outcomes

Business Alignment



Phillips ROI Methodology



Questions?

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