

Evaluation of training and development: an opportunity for a systems review?

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Abstract

Following Investors in People (IIP) assessment a membership organization wanted to understand how evaluation of learning and development (L&D) activities for 800 UK staff could be improved and aligned with business objectives.

We carried out focus groups, interviews with key stakeholders and a series of trio interviews with people who had recently undertaken L&D along with their manager and a peer. Analyses confirmed the need for knowledge sharing and quantification of behavioural and cognitive changes linked to current systems. These themes were explored by using the TOTADO model of evaluation (Birdi, 2006) to ensure future evaluation would be a marriage of theory and practice.

We created an evaluation model that interacted with human resource systems as well as shaping future L&D activities. This was supported by a set of tools utilising the organization's IT platform. Use of the model encourages role innovation and reflection in the workplace based on knowledge sharing. We delivered the model earlier this year and advised the roll-out across the UK.

Immediate results were IIP accreditation along with increased conversations about performance and the use of innovative approaches to learning. It is too early to measure financial or membership benefits for the organization but these are expected to occur after full implementation.

Introduction

According to the Learning and Skills Council's Survey in 2007 British companies spend 38 billion pounds (about 42.22 billion EUR) investing in the training and development of their staff. However, it is surprising how few organizations evaluate the return on this investment or enquire whether the training and development carried out is supporting the achievement of planned organizational goals.

Several reasons are given for the lack of practical evaluation: it takes too long; it costs too much to do; practitioners are unaware of how and what to evaluate (Bates, 2004); and the pace of change in the organization is so fast they have moved on before the evaluation results can be delivered (Birdi, 2000).

Most organizations do use post-delivery feedback (commonly called "happy sheets") to understand whether the goals of the training programme have been achieved and whether participants have enjoyed the experience. However, this type of evaluation fails to give account of learning taking place in the workplace following delivery or behaviour changes that can occur whether participants have enjoyed the programme or not (Arthur, Bennett, Edens, & Bell, 2003). This is illustrated by the quotation below from Arthur and colleagues.

"There is very little reason to believe that how trainees feel about or whether they like a training programme tells researchers much, if anything, about: a) how much they learned from the

program, b) changes in their job-related behaviors or performance, or c) the utility of the program to the organization” (Arthur et. al, 2003, p.235).

Transfer of learning to the workplace and knowledge transfer to peer workers are important aspects of learning and development that can lead to return on investment in training and development. Further, learning and development activities can occur within many situations both in and outside of the workplace; not only associated with formal learning. Examples of learning and development activities are: mentoring, work shadowing, secondments to different job roles, dealing with errors and/or complaints, and describing one's work to the public. Therefore, if the focus of learning and evaluation is solely based on directly taught opportunities and immediate evaluation the opportunity to measure return of investment, transfer of learning, knowledge sharing and changes in behaviour will be lost. Reticence in carrying out more in-depth evaluation in organizations may also be because one of the most well known model's of training and development evaluation from Kirkpatrick (1959) has been criticised for being theoretically and practically vague in its definition of learning outcomes (Phillips & Phillips, 2001). However, Kirkpatrick's training evaluation framework does encompass many of the aspects which Arthur and colleagues suggest are missing from the more simple forms of reaction style evaluations. The framework identifies four levels of analyses: reactions (trainees' opinions about overall and specific aspects of training), learning (acquisition of appropriate knowledge and skills), changes in work behaviours (whether trainees utilise newly acquired knowledge and skills in the workplace) and business results (does training appropriately influence the organization, perhaps showing an increase in production or reduction in errors). A potential solution to encouraging greater use of evaluation techniques would be to use another model of evaluation that builds on the strengths of the Kirkpatrick model and addresses some of the weaknesses.

One of the most promising models of evaluation of learning and development available today is TOTADO (Taxonomy of Training and Development Outcomes, Birdi, 2006) providing an 'integrative' and 'multi-level' approach to training evaluation (Birdi, 2006; Birdi, 2010). The model is based on the notion of Individual, Team, Organizational and Societal-levels of analyses and examines the impact of the learning and development activity on amongst other things: affect (how people feel); cognition (what people learn); work behaviours; health and fitness; and outcomes (a fuller explanation of the model is given in Figure 1 below). The level of detail the model provides helps practitioners to understand more fully how training can be assessed. The model suggests that measurements of outcomes should be taken (minimally) before and after the learning activity and at longer intervals after the activity (for example at six months or one year after the event to examine behavioural changes). Further, exploration of the learning and development activity should take place with a range of stakeholders: such as the individual, managers, peers, customers and clients using a variety of measurements (such as interviews, focus groups, objective performance measures and questionnaires).

There may be other reasons why organizations are reluctant to explore the evaluation of learning. They may not have practitioners sufficiently trained in the skills needed to carry out this work. Or, if they do, practitioners do not have time within their current job role to carry out evaluation adequately. A final reason for inertia in the evaluation of learning is that it requires a systems approach to organizational working that explores recruitment and selection, induction, formal and informal training and development processes, performance appraisal, career development, promotion and turnover. Put this way, undertaking evaluation may seem too daunting a task to be implemented by an organization and a way forward is to recruit external support.

The Institute of Work Psychology at the University of Sheffield has an experienced consultancy division; made up of occupational psychologists and researchers who are well placed to deliver high quality evaluation work within a reasonably short delivery time-frame. ConsultIWP was approached by a large membership charity based in the United Kingdom (UK) to work with them to examine their current evaluation process and build another that was applicable to their current working environment.

Figure 1: The TOTADO Model; an explanation of Outcomes

TOTADO	Sub Level	Explanation
Individual Level Outcomes	Affective	How people feel as a result of taking part in a learning and development activity (reactions, attitudes, motivation, self-efficacy)
	Cognitive	What people learn as a result of taking part in a learning and development activity (verbal knowledge, knowledge representation)
	Behavioural	What changes in work performance occur as a result of taking part in the learning and development activity (e.g., task performance, skills)
	Physical	What effects health and fitness as a result of taking part in the learning and development activity (e.g., levels of fitness and number of injuries)
	Instrumental	What events occurred as a result of taking part in the learning and development activity (work intrinsic e.g., praise from manager; work extrinsic e.g., pay rise, work relational e.g., better relationships, non-work e.g., qualifications).
Team Level Outcomes	Affective	How the team feels as a result of the individual taking part in the learning and development activity (team attitudes, motivation, efficacy, team well-being)
	Cognitive	What the team learns as a result of the individual taking part in the learning and development activity (verbal knowledge, knowledge representation)
	Behavioural	What effects on the team's work performance has occurred as a result of the individual taking part in the learning and development activity (e.g., team task performance, intra-team processes e.g., communication and support)
	Instrumental	What events within the team have occurred as a result of the individual taking part in the learning and development activity (work-intrinsic e.g., praise from manager, work-extrinsic e.g., pay rise, work relational e.g., better relationships)
Organizational Level Outcomes	Financial	Changes in the organization's financial performance as a result of individual taking part on the learning and development activity (e.g., turnover, profit, cutting costs)
	Processes	Changes in the organization's efficiency/way work is carried out as a result of learning and development activity (e.g., time to complete task, communication systems)
	Outputs	Changes in the organization's outputs as a result of learning and development activity (quantity e.g., work per employee, quality of product/service e.g., customer satisfaction, variety e.g., new products/services)
	Resources	Changes in the organization's personnel (e.g., absenteeism, satisfaction) and material resources (e.g., stock, waste) as a result of learning and development activity
Societal Level Outcomes	Economic	Impact of learning and development activity on local economy (e.g., investment, unemployment)
	Health	Impact of learning and development activity on health of the community
	Educational	Impact of learning and development activity on educational levels of the community
	Law and Order	Impact of learning and development activity on law and order issues in community (e.g., robberies, drug crime)
	Environmental	Impact of learning and development activity on geographical environment of region (e.g., pollution and waste levels).

The organization is a registered charity, operating both as a professional association and trade union representing over 400,000 members in the UK, and employing 800 staff based in the Countries of England, Scotland, Wales and Northern Ireland. The organizational purpose is to "represent the interests of its members, support and protect them, develop the profession and to achieve influence at national policy level". The organization spends a large amount of money (approximately £200,000 or 222,200 EUR a year) on the learning and development of staff supporting their members. The organization wished to conduct an evaluation of their current systems as it was likely that different methods were being used throughout the organization.

The central Organizational Development (OD) team, based in London, deal with the core development activities of the organization for staff and members. OD was unaware of the different methods and systems currently being used to assess learning and development activities across the different Countries. It was also understood that whilst there was and is a large investment in learning and development there was little knowledge sharing throughout the organization. Finally, a new Chief Executive had been in post for one year and it was his and the senior management teams' view that the organization needed to be more proactive in their responses to members needs and less entrenched in a "standard way of doing things"; hence there was a need for the organization to become more business orientated.

A further factor associated with this project was that the OD team were passionate not to talk solely of training programmes but to encompass all learning and development activities including informal learning opportunities. Within the organization there was a heavy reliance on formal training for staff and there was considerable misunderstanding about the purpose of individual Performance Appraisal. Many staff members felt the function of appraising performance was the opportunity to express their learning and development needs and to gain access to various "training courses". Management wanted to emphasise other learning activities that were available to staff and to harden the process of appraisal to focus more on individual performance.

Staff development was managed in each of the four Countries by Learning and Development (L&D) managers heading up a directorate. L&D managers would allocate budgets, oversee the administration of L&D activities; and deliver specific activities necessary for their Country area (e.g., the organization's member call centre was located in Wales and specific training to equip staff with skills and abilities to work in the call centre were delivered by the Welsh directorate). In addition, each L&D manager would coordinate the production of the directorates' L&D plan that would be presented to the central OD team. Within each directorate there were networks of L&D representatives involved in every stage of L&D - identifying local development needs, delivery of development activities, evaluation of activities and aligning L&D activities to organizational strategy. Managers and representatives away from the London headquarters were fully aware that senior management wanted to change the evaluation process and align it more closely to business needs.

In summary, ConsultIWP were asked to understand how the evaluation of learning and development activities was currently carried out for 800 staff. From this information we were to build and recommend a model of evaluation that could be applied across the four Countries taking a more systematic approach to learning and development that matched the business needs of the organization.

Method

In the interests of space we will describe the research process that led to the design of the evaluation materials and not give a detailed explanation of the various tools that were provided to the organization.

In order to appreciate how L&D activities for staff were carried out across the organization we designed a consultation process that would involve staff from England, Scotland, Wales and Northern Ireland. We conducted a focus group with L&D representatives across the UK to introduce the project, gain their involvement, set up local contacts and to understand their views about evaluation. It was important that all staff associated with this process were involved in the consultation and for that reason their views of potential evaluation formats were sought. In this way we could build our work on areas of good practice increasing staff buy-in to the project. In addition, we carried out stakeholder interviews with the Head of OD and the Human Resources Director to gain a strategic understanding of the issues facing the organization and the current change processes that were underway. It was essential that we produced a new evaluation process that had the backing of senior management and fitted the new performance orientated approach that they wished to adopt. Without such support it was unlikely that any new process would be successful. Following the interviews we arranged further consultations with the four Country L&D managers to appreciate how activities were currently being evaluated and how they would like to see this activity developed in the future.

To balance these managerial views it was important that we talked to individuals who had recently undertaken L&D activities and to see how knowledge from these activities were being transferred to the workplace. Therefore, in each Country we set up a series of trio interviews with a participant, their line manager and a peer. This information helped us gain an understanding of the depth of evaluation currently being carried out. From the individual we could appreciate how much evaluation occurred at the individual level. From peers we could understand what knowledge transfer activities were taking place in the workplace and from line the managers we could understand the impact learning would have on performance at a local level. Conversations with each of these representative groups would be helpful in the design of the future evaluation system and its practicality.

All interviews were carried out face-to-face or over the telephone by one or two researchers. Interview schedules were emailed to the participants in advance so they were aware of the questions along with a brief synopsis of the consultation process. Interviews lasted between 30 minutes and 60 minutes and the interviewer(s) took thematic notes during the conversations. Themes from these notes were fed back to the participant in line with best practice (Bryman & Bell, 2003). Interviews were not taped to protect the anonymity of the participant.

All questions used in the interviews and focus group were devised based on the TOTADO model. We wanted to gain as much information about evaluation and understand meaningful aggregate concepts within the workplace (such as work groups and teams). We created four different inquiry schedules for: Focus Groups, Senior Managers' interview, interviews with the Country L&D Managers and Trios. In all the interviews we asked about what was happening generally within the organization in terms of evaluation. For example: *'How do you currently carry out learning and development evaluation?'*

Within Senior Managers interviews we asked questions that related to the organizational level of analysis as managers would be best placed to comment on how much evaluation currently considers aspects of organizational need and outcomes. For example: *'How do learning, development and evaluation fit in with organizational targets?'* *'What would make the organization's learning and development evaluation more effective?'*

Within the Country L&D managers' interviews it was particularly important to identify what each Country office was currently doing in terms of L&D activities and evaluation and to understand similarities and differences across the Countries. For example, we asked: *'What is your current local L&D output? "What is the L&D cycle? How do you decide on what L&D activities to carry out"?' We finished by requesting trios of a manager, a participant and a peer who we could interview at a later stage.*

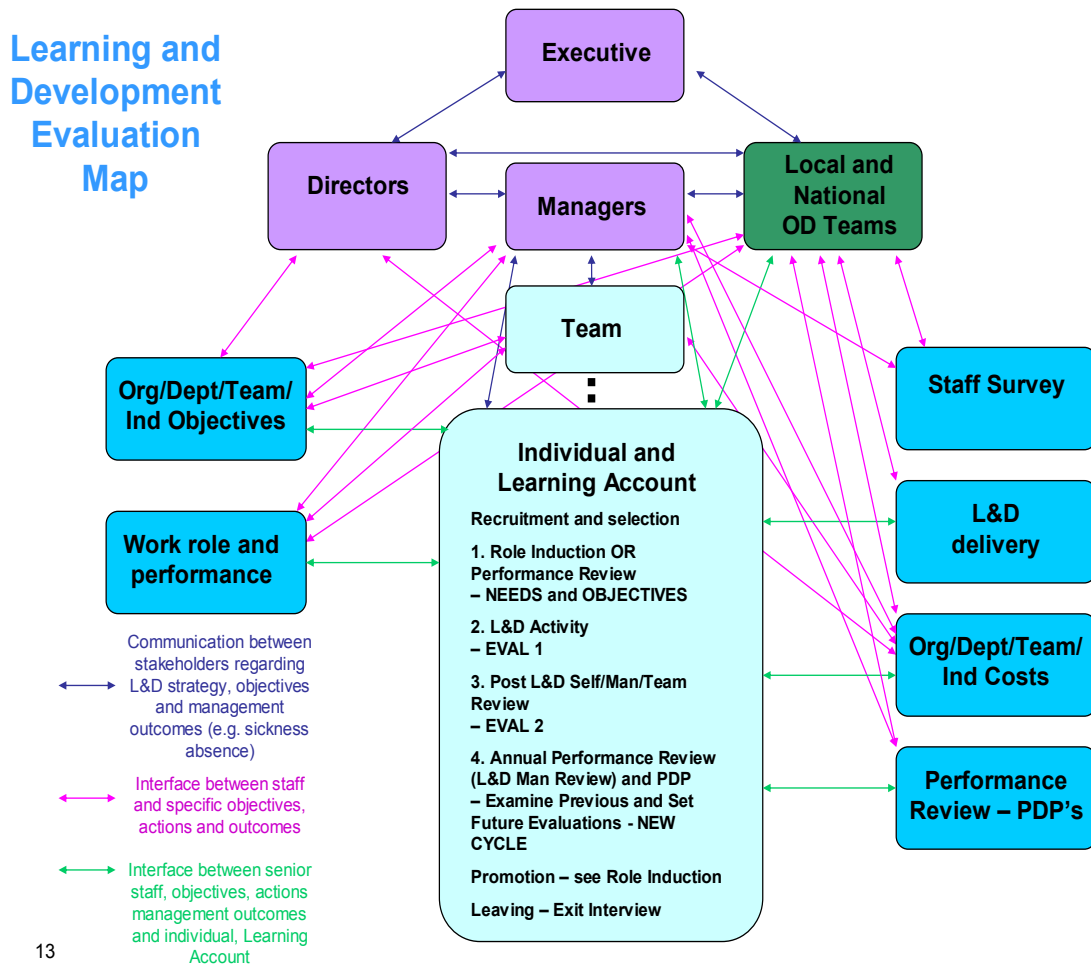
Trio interviews were carried out with a recent L&D participant, their line manager and a workplace peer. We asked about knowledge sharing, the practicality of carrying out pre and post measures associated with the L&D activity, and opportunities to quantify changes in affect, behaviour and cognition. Example questions were: *"Did you discuss this learning and development programme with you line manager BEFORE attending the course? Did you tell / discuss the activity with your peer group / work group so that you could pass on some of your learning?"*

Immediately following the interviews we did some analyses to develop our ideas about what the evaluation process should look like. We inspected the themes from the Trio interviews to gauge how our ideas of an appropriate future evaluation process matched that of others within the organization. In addition, we took some time to understand and map out how the various human resource processes (such as induction and promotion) were used in the organization, along with the organizational structure and how evaluation could map onto these processes (see Figure 2 below).

We analysed qualitative data by constructing templates based on the interview questions (Thematic Analysis, Braun & Clarke, 2006). Data was compared and contrasted and comments were grouped into themes. This enabled us to understand the common needs across the organization and those needs that were specific to a particular area or Country. These themes were then validated (or not) within the trio interviews. It was important to clarify the substance of the points that were being made, to make sure that the initial themes were accurately reflecting participants' views and to collect any additional / different information that was being offered. The resulting themes were related to the TOTADO model to ensure the theoretical framework

was maintained. Correspondences of data to the levels of the model were noted as were any gaps. These data were compared with the systems model of the organization (see Figure 2). By examining areas of good practice and suggestions for future evaluations a picture developed of the areas that required strengthening and those that needed to be developed.

Figure 2: A systems map of human resources processes, organizational structure and evaluation



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Following the analyses an organizational report was written in the form of a Power-point presentation. It was important that information was presented in an interactive way so that the complex findings could be fully explained to the client to aid understanding of the new evaluation cycle. A visual form was useful as it could be used to train individuals in aspects of the new cycle; thus maintaining accuracy of our input and saving the client time and resources creating new materials. This presentation was given to the OD team in a three-hour conference where they took ownership of the process and planned how to inform the other participants and Country stakeholders as part of the roll-out process.

Results

In total 26 staff were consulted across four Countries. No one participant withdrew from the process and all were keen to be involved and to describe their experiences of the current system and offer improvements. From our initial consultation we decided to drop the Societal-level of evaluation recommended by the TOTADO model. This would have been a “step too far” to consider issues outside the organization before major business objectives were aligned.

Our analyses highlighted some important themes suggesting people in the organization appreciated that evaluation was more than simply a tick box exercise but were aware that the current system was over simplistic. L&D staff wanted to keep some of the information about the practicalities of classroom training in the new system. However, at Individual-level there were few materials in existence that explored the application of learning in any depth and identified criteria that would be associated with positive outcomes after an L&D activity. Therefore, it was critical that the new system would build in time with the participant and their line manager to discuss learning both before and after the activity.

Team-level analyses demonstrated a strong need to demonstrate changes in behaviour and to build on areas of good practice where knowledge transfer to the work group was being achieved.

Organizational-level analyses highlighted the importance of line manager involvement to set expectations of learning and transfer from activities both before and after L&D activities. Table 1 below sets out more fully the main themes identified within the interviews.

Table 1: Summary of themes and comments from interviews

TOTADO	Themes from analyses	Quotes/ explanation
Individual Level		
Affective	Keep happy sheet	'We still want to keep in some 'happy sheet' information'
Cognitive	Assessment of learning, knowledge transfer, application of knowledge	'There is little application of learning'
Behavioural	Changes in work place behaviour	'I am keen to be able to evaluate what is being done differently after the learning and development activity in terms of competence or behaviour'
Instrumental	Identify success criteria	'Success criteria need to be identified'
Team Level		
Affective	Keep happy sheet	'We still want to keep in some 'happy sheet' information'
Cognitive	Knowledge transfer, application of knowledge	'I went on a workshop, came back to the office and shared what I had learned in a team meeting. It helped my learning and I'm sure it helped others'
Behavioural	Changed team and boundary behaviours	'We want evidence that practice changes behaviour'
Instrumental	Identify success criteria	'We think that more emphasis should be placed on evaluation at the outset of activities; asking what people want to 'take away from session'
Organizational Level		
Financial	Return on Investment in Learning & Development	'Individuals and managers must consider Return on Investment of activities – helps individuals understand the value of learning and development activities'
Outputs	Identify success criteria	'Work with line managers to identify what is important to gain from each activity; spending time after to see if these criteria have been achieved'.
Processes	Standardisation across four countries, links in with other systems	'Activities need to be talked through with a manager and reflected upon – we have no formal structure for this'
Resources	L&D matches organizational objectives	'We need to fit learning and development activities in with organizational and directorate objectives'.

In addition, our analyses identified a number of general features that a new evaluation system should consider. These have been placed into three categories; HOW the evaluation should be carried out, WHAT the evaluation should consist of and what OUTCOMES do the organization want out of the evaluation. Example features include: evaluation should be a reflexive activity that was considered a natural part of every L&D activity; L&D activities should be matched carefully to individual work objectives and needs; any new system would utilise the current IT platform; evaluation would provide overview information for the senior management team demonstrating return on investment. Table 2 below describes these themes in more detail.

Table 2: Summary of themes relating to general features of a new evaluation process

General Features		
How	Make evaluation a reflexive activity	Interviewees stress the importance of making evaluation more reflexive, and allowing them the time to really consider the learning that had just taken place and how they could then apply this to their work place.
	Managers involved in evaluation	It was also clear that there needed to be some standardisation around the involvement of managers in the evaluation process; some managers were doing this well whilst others were not involved and rarely discussed learning activities with their staff.
	Work time and space allocated for evaluation	"We can't do the appraisal in the managers office; there are too many interruptions and no IT"
What	Sets up expectation of evaluation of L&D activity bespoke to individual needs	The evaluation process must be a part of all aspects of the organizational life cycle and most importantly managers must set up the expectation of evaluation of learning from induction, into performance appraisals and throughout an individual's career.
	Matches to individual, team, and organizational objectives	It was evident that organization wanted to move away from the standard set of courses offered to more bespoke learning and development activities which really address individual learning needs.
	Electronic system supported by current platform	The best way to incorporate the new evaluation processes would be to utilise their current electronic learning platforms. This would standardise processes whilst using a system individuals' are already familiar with.
Outcome	Provides feedback to senior management team (SMT).	Evaluation of L&D activities must feedback essentials to SMT: they must be able to see whether there has been return on investment and have some basic facts and figures around L&D. It is important the OD team are able to use evaluation to inform their feedback to SMT and to be able to plan future investment and activities.

Having identified key themes from the consultation and linked them with the TOTADO model, we were able to set these within the organizational systems (see Figure 2) and design an appropriate evaluation framework. The evaluation was based around an Individual Learning Account utilising the organization's current IT platform.

The evaluation framework consisted of a series of tools and a set of processes to be followed at key points in the organizational life cycle. The primary focus being the Individual Learning Account in which L&D needs are set out and evaluated. When an employee enters the organization they proceed through specific stages such as role induction, annual performance appraisals, promotions and leaving; evaluation was incorporated into each of these stages.

At Role Induction or Performance Appraisal it is important to set up expectation of taking part in the evaluation process: completion of evaluation tools, sharing of knowledge, reflection and

quantifying behaviours that may have changed. It is also important that managers work with employees to clarify their work roles and what L&D they may require to develop in their roles. It is critical this is a two-way process as role holders may well offer managers useful insights into how best to develop or alter work roles. This process introduces an element of role innovation and possible change.

Once individuals have taken part in an L&D activity they are asked to complete an L&D activity evaluation tool. This tool incorporates measures of knowledge and behaviours while encouraging reflection. For example, employees are asked to rate their levels of competence in certain skills and behaviours related specifically to their job and to reflect on the application of the learning in relation to their work situation, team and the organization more generally.

In order to assess transfer of learning to the work place and to others we designed the second set of tools to assess the impact of the L&D activity at later stages e.g., 1-2 months, 6 months or 9 months after the L&D activity had taken place. This tool incorporates self, manager and peer ratings in order to quantify shared learning and any changed behaviours or skills from an objective stance.

The evaluation tools are used as part of the Performance Appraisal process to examine changed behaviours, reflect on work objectives and previous L&D activities and to plan future activities. The annual Performance Appraisal signals the start of a new evaluation cycle and managers and individuals are encouraged to revisit their expectations of the L&D activities, the criteria they set up to appreciate success and any changes in work objectives.

Employees may be promoted or leave the organization at some point in this cycle. When promoted the employee will start their new role with a Role Induction interview in which their manager will clarify new work objectives and identify appropriate L&D activities. This introduces the Induction Phase tool. If an individual decides to leave the organization their exit interview is a useful time for the manager to reflect on individual and group work roles, L&D activities and other things that may or should have happened in the employment. Some of the reflective questions used within the tools can be modified for this activity providing valuable information and learning for the organization.

Discussion

In summary, we developed an evaluation of Learning and Development (L&D) that incorporates all parts of the organizational system from induction to exit. Figure 2 illustrates how L&D evaluation is linked into human resource practices, stakeholders and stages within the organizational life cycle. Most importantly the evaluation promotes joined-up thinking between staff and managers so that people are being developed in line with organizational objectives promoting a greater return on investment. We have encouraged a multi-level conversation between the manager, the employee and the work group to capture aspects of role innovation.

The TOTADO framework provided a robust model enabling exploration of a multi-level perspective of organizational life. The model encouraged reflection and application of the human resource systems already in place and the development of an evaluation process that was systematic and sensitive to desired changes in organizational culture. The features of the TOTADO model build on the model of evaluation described by Kirkpatrick (1959) in focusing the assessment of learning and development in the workplace and at the work group and organizational levels. TOTADO was sufficiently descriptive enabling new systems to be developed in contrast to the more vague terminology of the Kirkpatrick model. However, we were unable to use the Societal-level outcomes from the model to examine the impact of learning and development with the organization with regard to the economy, health, education and environment of the various Countries. As a systematic evaluation process was new for the organization the inclusion of these broader concepts would be too greater focus on external aspects of the organization. We would hope, in the future, as the evaluation process becomes embedded within the Country areas that it would be possible to incorporate a broader impact analyses on Societal outcomes. It is entirely possible the role innovation encouraged by this model will examine environmental and educational changes in the near future that will bring this aspect of evaluation one step nearer.

Within a few months of the completion of this project the client organization are delighted that they are utilising a cutting-edge model of evaluation that is driving their performance management strategy. The immediate result was accreditation by Investors in People. In addition they have developed their performance management process with managers' reporting more frequent conversations with staff about their day-to-day and future performance. Staff appear to be adopting a more reflective approach to their learning and development by the slowing down of the decision-making about development activities and taking time to understand the relationship between learning activities and work objectives. Further, there is documented evidence of more innovative approaches to learning such as job shadowing and mentoring being used in the organization. The systematic approach is enabling the OD team to build a picture of learning and development across the four Countries that was previously absent. It is too early to measure financial or membership benefits for the organization but these are expected to occur after full implementation. The authors have had this work short-listed for an award by the Division of Occupational Psychology, at the British Psychological Society. The judging panel were impressed at the application of theory to the practices within the organization.

There were several features of this evaluation process that were critical to the success of this project. These were:

- Introducing differing forms of L&D to supplement traditional classroom tuition;
- Considering evaluation at the Individual, Team and Organizational levels;
- Assessment of change in knowledge and behaviours before and after L&D activities;
- Continuing assessment of change for periods up to 12 months to examine longer term effects;
- Incorporating self, peer and line manager feedback on knowledge and behaviours;
- Providing information on return of investment and encouraging staff and managers to appreciate the costs involved in L&D;
- Offering opportunities for managers, peers and employees to stand back and review roles, systems and objectives encouraging innovation;
- Providing opportunities to see where challenges lie in changing the organizational culture towards a more systematic way of thinking and working. Exit interviews will be helpful in this process;
- Finally, and possibly most importantly, providing a systematic view of evaluation that is incorporated within the existing organizational processes.

Reflections

As with any piece of qualitative enquiry we found it helpful to reflect on the process used and the points of learning we gained working with this client. We discovered the power of maintaining on-going communication throughout the project by using a tailored consultation process and data collection that listened to as many different peoples' views about Learning and Development as possible. We are continuing to work with the organization on various projects and realise how important it is to revisit the objectives of the evaluation process with the senior management team in one or two years to see how these are changing.

In the consultation process we acknowledged what was currently working well within the Country areas and what they wanted to do in the future. By linking our theoretical model to areas of good practice and building on these we "took the organization with us" encouraging and assisting implementation. The process of listening to people improved our understanding of the possibilities and limits within the development of our model (e.g., not using the Societal-level of TOTADO).

We presented the work to the client using active methods of presentation rather than delivering a complex report that may have been misinterpreted or taken them a long while to understand. By continuing an interactive dialogue communicating our findings and proposed methods of evaluation and by listening to what was possible within current working practices (such as building on their existing IT platform) this assisted the immediate roll-out of the process across

the Country areas. The client was saved the workload of devising training materials and we maintained control of the level of accuracy that was achieved in the roll-out communications.

There were several limitations to this piece of work. The consultation, while broad was not extensive and there may have been some areas that were neglected. We have advised the organization to conduct a detailed survey of the use of the evaluation process as part of their annual staff review; this will happen in early 2010. This will allow the organization to fine-tune the process of evaluation. There was one level of the TOTADO model that was not used within our research. It is hoped that the Societal-level of evaluation can be incorporated into the evaluation process once the basics have been embedded.

Bearing these points in mind we believe that we have delivered a systematic evaluation process that is reliable and valid and matches the organization's needs at this time. We are aware that those needs will change over time and that is it important that the system is robust enough to reflect this.

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