FET 4: Evaluation of Training and Transfer of Learning

Levels of Evaluation

Transfer of Learning

Four Levels of Evaluation

Training outcome

Participants will classify evaluation activities into 4 major levels of evaluation.

Participants will submit an evaluation plan to use with the training they have been working on.

Participants will describe the purposes of the data analysis process and uses for evaluation information.

Participants will select data analysis processes that can inform them about refinement of one of their training sessions.

Participants will apply key data analysis questions in analyzing a training session to determine the level of refinement needed.

Roadmap 

- Review the purpose of evaluation.
- Identify some pros and cons of evaluation.
- Explore data collection techniques for evaluating effectiveness of training.
- Discuss the three ways data can be used and how that influences analyzing and reporting the data.
- Identify the four reporting questions that must be asked and answered by the trainer.
- Identify some reflection questions that **guide** the creation of Evaluation Forms and **support** the trainer's self-reflection of the training session.

The Purpose of Evaluation

The purpose of evaluation is to measure and describe outcomes at scheduled points in time. Evaluation involves a variety of methods to measure whether the outcomes set for the learners have been achieved. It is essential to plan not only HOW a trainer will measure outcomes, but WHEN to do so.

Four Levels of Evaluation

Participant Reaction (Level One)

This information is collected **immediately following the training.**

Questions asked at Level 1 are targeting **how a learner feels about the training**. This may include questions about the meeting location or how well the content and activities were received. These are all opinion related questions based on their feelings of being at the training.

Sample questions:
What did you like best about your training experience today?
On a scale of 1-5, how well organized was this training?
On a scale of 1-5, how helpful were the handouts?
Would you recommend this training to a colleague?

Methods:
The best methods for this level could be a rating scale, yes/no questions or even open-ended questions. You get more usable information asking a simple open-ended question than a yes/no question.
For example, Are you satisfied with the support materials vs. What did you like about the support materials? Did you enjoy the training session vs. What did you most enjoy about this training session?

Participant Learning (Level Two)

This information is collected **immediately following the training.**

Questions asked at Level 2 are targeting the actual content and skills covered in the training.

What did the individual actually learn? Here you are asking for concrete specifics about what they have learned.

Sample questions:
List three new strategies that you plan to implement in your classroom.
Provide three different examples of “open ended” questions.
Identify the four levels of evaluation.
Describe three new activities that you will use to increase active movement throughout the day.

Methods:
Methods for capturing information at Level 2 could include lists, descriptions, or comparisons.

Important: Level One (Participant Reaction) and Level Two (Participant Learning) evaluation data is captured at the end of the training session.

Four Levels of Evaluation

Behavior Change (Level Three)

This information is captured **after a short period of time** (i.e. possibly 4-8 weeks later) allowing the learner an opportunity to apply their new knowledge and skills back at the workplace. This level is inquiring about what **teachers** are doing differently back in their classroom **after** the training session. At this level you are measuring the use of the new knowledge and skills back on the job. This requires follow-up, depending on the topic, 4-8 weeks after the training to measure and determine change.

Methods:
Pre and Post list of materials in the science center
Pre and Post set of photos showing changes
Pre and Post observation narratives

*The key to this process is that it starts way back during the Needs Assessment so that the teaching staff can collect the baseline information from which to measure. This may involve a pre-assignment before the training. Teachers may be asked to send or bring photos of a certain center in their room or an inventory of the items in their outdoor play area.

Determining your follow up timeline in advance is important. Share with your trainees that they will receive a follow up survey in 6 weeks and to be on the lookout for it.

Early childhood professionals need time to practice and implement the new information.

Results and Impact (Level Four)

Level Four evaluation measures the results and impact for **children, families or for the overall program**. That is the key to remember. If you can clearly demonstrate the level of impact a training has had on the overall program, a Director will feel they are receiving a return on their investment of professional development dollars.

This information is captured **after a longer period** (3-6 months later) allowing the early childhood program an opportunity to apply what they have learned back at the workplace.

Sample questions:
Are children healthier, missing less days of school due to illness?
Has there been a drop in challenging behaviors since the children are now more actively engaged in cooperative play?

Results and Impact is measured around 3-6 months post training depending on the type of content and how long it may take to measure the actual impact. Clear pre and post measures are needed and again must be thought through weeks prior to the actual face to face training.

Training Improvement Process

The Training Improvement Process provides a look at how evaluation information can be used and asks the trainer specific questions regarding data that determines the training process, the trainer's personal performance and cost effectiveness/justification of the training. Each of these areas is addressed within the four levels of evaluation.

How will the data be used?

How the evaluation information will be used directly impacts how the data will be analyzed and reported.

- Will data be used to determine the PROCESS→ how to improve the training itself and/or the outcomes for the participants?
- Will the data be used to determine the trainer's PERSONAL PERFORMANCE→ how well the trainer facilitated the training?
  - *Level I* and *Level II* Evaluation typically cover these two areas.

Will the data be used to determine the COST EFFECTIVENESS? → Can the training be **justified** to the administrators and/or to the funding source?

- *Level III* and *Level IV* Evaluation typically cover this area.

Analysis of data is important because those hiring you to train care about their 'return on investment"" otherwise referred to as ROI.

Who will receive the results?

These individuals could be interested:

- Director/Administrator
- Session Participants
- Funding Source
- Families

What specific information will they need?

The information trainers need from an evaluation include:

- Participant Reactions
- Results and Impact
- Behavior Change
- Content Learned

Training Improvement Process

What dissemination format?

What dissemination **format** will be most appropriate?

- Copies of Evaluations
- Narrative Report
- Graphs
- Summary of Evaluations

How to disseminate information?

How will the information be disseminated?

- Face-to-Face Presentation
- An emailed 1-2 page Summary of comments and calculated averages
- Written Narrative via email
- Hard-copy of Summary/Narrative; *hand delivered/mailed*

Review of Important Reporting Questions

Reporting questions that need to be asked and answered…

- **Who** will receive the results?
- What **specific information** will they need?
- What dissemination **format** will be most appropriate?
- **How** will the information be disseminated?

When you take the time to analyze your data, you then have the needed information to make refinements in your training style, the training content and the subsequent training delivery. The next part of the training improvement process is looking at the connection between evaluation and refinement of your training.

Analyzing Training Data

In this section we will look at helpful questions that will assist you in analyzing your training and determining the refinement that is needed to make it more effective for future participants.

Necessary Step: Post-Training Reflection

- If you are **new** to training, *consistently engage in the post-training reflection* exercise of analyzing information from participant evaluation forms and self-reflection.
- If you are an **experienced** trainer, but *not taking the time or effort to do this post-training reflection* exercise, it is time to implement this step in your workshop process.

The questions asked on participant evaluations are very important. They are the premise for getting the answers needed for reflection, analysis and, ultimately, refinement of that training. Likewise, the trainer should answer these same questions as part of his/her self-evaluation. This process of analysis; reflecting back, documenting observations and analyzing the level of effectiveness in implementing the training process, content, activities and of their own skills and knowledge as a trainer, should be a consistent part of a trainer's workshop process.

Here are some important reflection questions a trainer should use to guide the development of their evaluation forms and for self-evaluation, post-training.

Each of these questions can be answered from *two* perspectives:

1. From information summarized off *participant evaluations.*
2. From the *trainer's* own observations and experiences while conducting the training.

One very important message to get from this section on Refinement of Training is that not only do you need to get and pay attention to feedback from participants, you need to also self-analyze. Your own observations of participant's actions, interactions and reactions during the workshop, as well as your observations of your own actions, interactions and content delivery throughout the training session provides much information on what went well and what needs to be refined to make the next workshop experience more effective.

Analyzing Training Data

Post-Training Reflection

...a series of questions to ask yourself:

- In what ways did the training **process** *do what it was designed to do* in regard to the Workplace Outcome and Training Outcomes?
- At what *level of success* did the **content** do what it was designed to do in regard to the Workplace Outcome and Training Outcomes?
    - In what ways should the **process** be revised?
    - In what ways should the **content** be revised?
    - In what ways (if any) does the training **content** need to be *revised* due to:
    - a need to align with revised Training Outcomes developed to meet federal, state, local regulations?
    - a need to meet changes in recommended practices?
- If the training needs to be *expanded*, what are the reasons;
    - need for additional content, time issues, etc.?
- If the training needs to be *eliminated*, what are the reasons;
    - lack of need, cost effectiveness, duplication of content, etc.?

'Series of Questions' Tool

Using the 'Series of Questions' tool, you will

- Gain useful information
- Better analyze and determine future steps
- Better prepare for subsequent training
- Better meet your own goals as a trainer

You can customize this tool by adding questions you deem useful!

The Transfer Partnership

Training Outcomes

Participants will define effective training and transfer of learning.

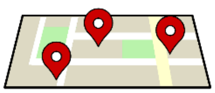
Participants will identify the people that are key to successful transfer of learning and why transfer of learning is a team effort.

Participants will select appropriate follow-up strategies that increase the probability that learning and skills will transfer from the training setting to the participant's workplace.

Participants will describe what an implementation/action plan is and why it's an important part of the training process.

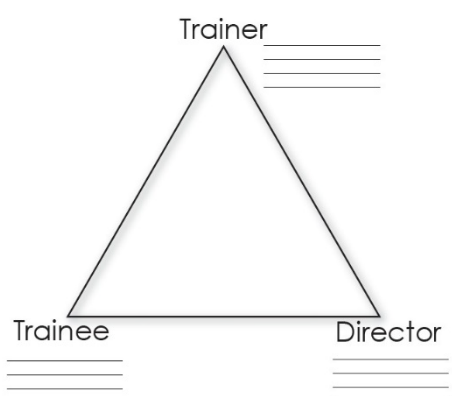
Participants will complete an Implementation Plan/Action Plan.

Roadmap



- Explore the connection between the training experience and the actual transfer of learning back on the job.
- Discuss barriers that may prevent trainees from transferring knowledge and skills back in the workplace.
- Identify the people involved in a transfer partnership and their responsibilities.
- Explore and summarize a specific strategy that supports follow-up and transfer of learning back on the job.
- Define implementation plan/action plan and the rationale for including it in the training process.
- Identify what should be included on an implementation plan/action plan.
- Explore different transfer of learning strategies and develop a transfer activity for a future training.

The Transfer Partnership



Effective Strategies For Supporting Transfer of Learning

BEFORE:

Trainer:

Trainee:

Director:

DURING:

Trainer:

Trainee:

Director:

AFTER:

Trainer:

Trainee:

Director:

Developing a Follow Up Plan

Important items and questions to consider when developing/creating your own useful Implementation Plan/Action Plan ***form***:

- Identifying information; name, workshop title, outcome (skill/skill-set).
- The steps I need to take to implement the outcome.
- Where will I implement my plan?
- What obstacles stand in my way of implementation?
- What can I do to reduce/overcome the obstacles?
- What kind of support do I need?
- Who will support me in my implementation efforts?
- When will I evaluate my progress?

Implementation Plan (Short Version)

Name:	**Trainer:**
Training Title:	
My Goal is to:	
Activities to meet this goal. **1.** **2.** **3.** **4.**	**Resources Needed:**
Re-evaluation date:	

ACTION STEP IMPLEMENTATION PLAN and SELF-EVALUATION of PROGRESS

Name:______________________________ Training Coach:________________________________

***Immediate Outcome:* Skill I want to implement:**	**Self-Evaluation Date:**
Steps I need to take to implement that skill:	**Steps I have successfully implemented:**
1)	1)
2)	**2)**
3)	**3)**
4)	**4)**
Where will I begin to implement this skill?	**Where I successfully implemented this skill:**
What obstacles stand in the way of implementation?	**Obstacles I have overcome:**
What can I do to overcome the obstacles?	**Strategies that worked to overcome obstacles:**
What kind of support will I need?	**Kind of support I received:**
Who will support me?	**I received support from:**
I will begin implementation...Date:	**I □am/□am not ready to move to my next goal.**
I will evaluate my progress...Date:	**Not ready & will re-evaluate my progress… Date:**

Implementation Plan and Self-Evaluation of Progress **form, created by Susan M. Terdan, Training Specialist, University of Kentucky**

Developing a Follow Up Plan

Follow-Up after the training by all members of the Transfer Partnership is the gauge for monitoring progress of participant's change in behavior based on their Implementation Plans.

- By the **Trainee**, at intervals, using some form of self-evaluation of the goals stated on their Implementation Plan.
- By the **Director/Administrator**, monitoring and supporting the trainee's efforts in working through the steps on their plan.
- By the **Trainer**, monitoring and/or supporting the trainee's efforts as they work through the steps on their Implementation Plan, via e-mail, phone or face-to-face contacts.

There are many different types of follow up with the trainee in the implementation process after the training:

- Check-in and see how the trainee is doing.
- Answer questions trainees may have.
- Offer support and provide feedback trainees may need.
- Provide encouragement and guide next steps.

Follow-Up options that encourage both 'trainer to participant' connections and 'participant to participant' connections:

- E-mail, individual e-mail or group e-mail
- Social Media such as Facebook
- Conference Calls
- Community Blog
- List Serves
- Webinars

Developing a Follow Up Plan

Learning Boosts are intentionally planned, brief, and precisely-timed follow-ups to training carried out via email or other social media/online platform.

Types of Learning Boosts

______________________________**Boosts:** Involve simple recall of information presented during the training. Multiple-choice questions are good for this, but they must be designed to make people think. The answer CANNOT be obvious.

___________________________**Boosts:** Call for thinking and composing an answer based on information from the training. Fill in the blank or open response questions that require application of knowledge work well for this.

___________________________**Boosts:** Involve thinking, forming an opinion and sharing it with peers. Open response questions in a chat room environment or a poll where results are shared will get the job done here.

Keep boosts brief and be sure to provide feedback on how their responses compare to the correct answers or to peer responses.

Effective Timing

- 2-3 **RECOGNITION BOOSTS** within **2**___________of the training.
- 2-3 **GENERATIVE BOOSTS** within **2**___________of the training.
- 2-3 **INTEGRATIVE BOOSTS** **2**_______________after the training.

This summary of Art Kohn's concept of Learning Boosts (www.artkohn.com) was created by Beth Robinson.

Additional Resources to Support Transfer of Learning

Books:

- ***50 Creative Training Closures*** - Lynn Solem and Bob Pike; "Action Planning" items
- ***Games Trainers Play*** – John W. Newstrom and Edward E. Scannell; pgs. 293-303
- ***Making Training Stick*** – Barbara Carnes and Dora Johnson; pgs. 57-90
- ***The Best of Creative Training Techniques*** – Dave Zielinski; pgs. 81-93
- ***Trainer's Bonanza*** – Eric Jensen; pgs. 105-108

Contact your Training Coach to access these titles through our lending library. A comprehensive list of the Training Lending Library is available, contact your Training Coach to request this list and discuss its use.

Online:

makingtrainingstick.com – website with the mission of helping trainers "make training stick"

- offers a free newsletter called **STICKY NOTES** with actionable effective training tips
- contains a free downloadable "white paper" – **Training Transfer Technologies** – featuring research and review of technology that can help the transfer of learning process.

This is by no means is a finite list of resources. However, it is a solid start of resources that offer a wide variety of **transfer of learning strategies** to implement with trainees.

- Remember, transfer of training is a **partnership** between the Trainer, Trainee and the Director/Administrator.
- Many of the strategies provided by the authors of these resources recognize this partnership and include all three parties in the process they describe.
- You may also contact local training facilities, libraries, and colleges to see what they have available amongst their cadre of resources.