

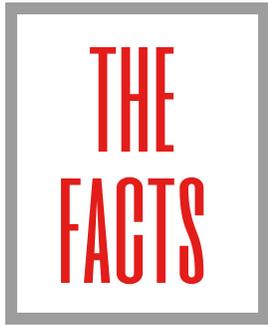


# The Sad State of Measurement & Evaluation of Learning

*By Ken Phillips, CPLP*

*What has happened in the world of measurement and evaluation of learning in the past decade? The sad truth is almost nothing. This ebook reviews the results from three research studies conducted by the Association for Talent Development (ATD) in 2009, 2015, and 2019\* –and clearly shows that not much has changed in ten years.*

# The ATD studies



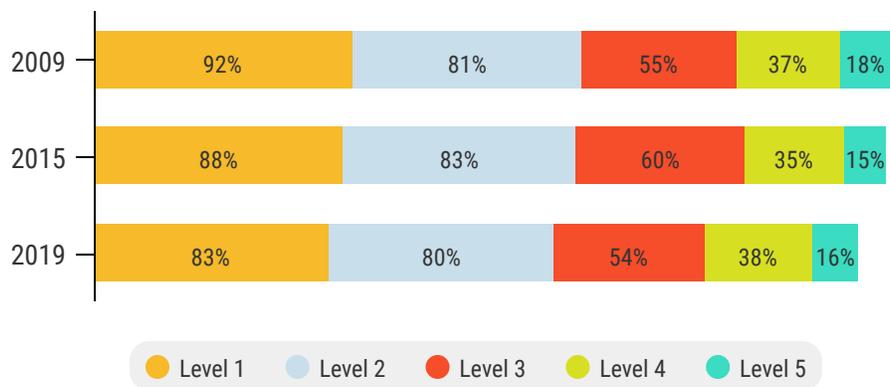
Ten years:  
2009-2019

A countless number of presentations delivered, and articles and books published on the topic of evaluating training at higher levels.

The percentage of organizations evaluating training at higher levels remains essentially unchanged.

Reviewing the results from three research studies conducted by the Association for Talent Development (ATD) in 2009, 2015, and 2019\* clearly shows that not much has changed in ten years. As shown in this chart, the use of Level 1 and 2 evaluations continues to dominate. In contrast, the use of Level 3, 4, and 5 evaluations continues to lag far behind.

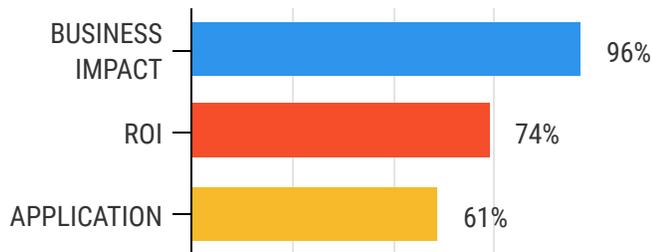
**% of Organizations Evaluating Some Learning Programs at Each Level of Evaluation**



# What do CEOs really want?

These numbers look even worse when stacked up against the research results found by Jack Phillips and the ROI Institute in a 2009 survey of 96 CEOs from Fortune 500 companies. When asked what type of evaluation information CEOs most wanted to see from their learning and development investments, the following results emerged:

## WHAT CEOs WANT



- The number one measure CEOs desired most was evidence of business impact (Level 4), selected by 96% of the CEOs.
- The number two-measure was ROI (Level 5), chosen by 74% of the CEOs.
- The third most desired measure was evidence of the application of learning back on the job (Level 3), selected by 61% of CEOs.

**A second question in the ROI study asked CEOs how often they received the type of evaluation information they desired.**

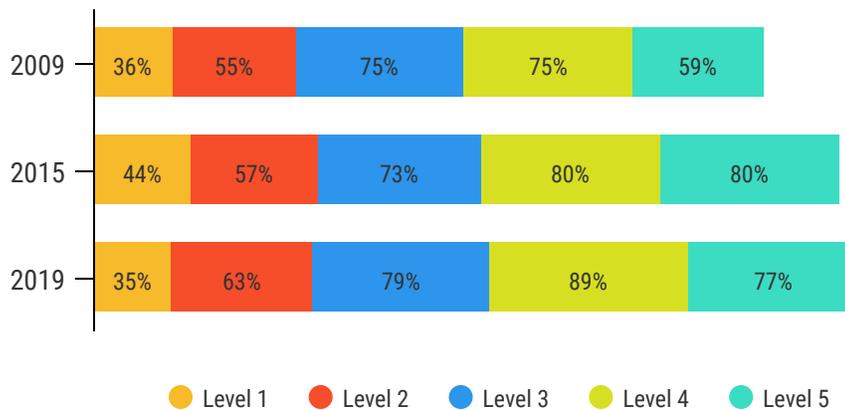
Amazingly, only 8% of CEOs indicated they received Level 4 business impact data. Only 4% said they received Level 5 ROI data, and only 11% reported they received Level 3 application back on the job data. To borrow a quote from Tom Hanks in the movie Apollo 13, "*Houston, we have a problem!*"



# How valuable is evaluation data?

A second compelling finding from the ATD measurement and evaluation studies was the contrast between the percent of organizations that used the various levels of evaluation and the value of the data collected at each level. Specifically, as you can see in the table below, the perceived value of the data collected using Level 1 and 2 evaluations was significantly lower than the perceived value of the Level 3, 4, and 5 data. Also, noteworthy is that the perceived value of Level 4 data is trending upward.

**% of Organizations that Viewed Evaluation Data as Having High or Very High Perceived Value**



These results raise an interesting question for all L&D professionals to consider. Specifically: *"Since the perceived value of Level 3, 4, and 5 data is high, and it's the data CEOs most want to see, why aren't more organizations trying to find ways to collect this type of data?"*

# Why don't we give CEOs what they want?

There is no single answer. Among the reasons mentioned most often are:

There is a belief in the company that providing training is the "right thing" to do, and evaluating it isn't necessary.

It costs too much and takes too much time to conduct higher levels of evaluation.

We don't have the skill sets in the L&D department needed to conduct higher levels of evaluation.

It's too hard to conduct higher levels of evaluation.

None of the business executives the L&D department supports have asked for this type of data.

The results from conducting higher levels of evaluation might make our department look bad.

While there might be an element of truth in some of these reasons, most don't hold water.

However, based on my experience, the statement, "We don't have the skill sets in the L&D department needed to conduct higher levels of evaluation," does have credibility. I think this generally is true. **Most L&D people are in the profession because they want to help others improve their performance. They didn't get into it to collect and analyze data.**

# What's an L&D Professional to do?

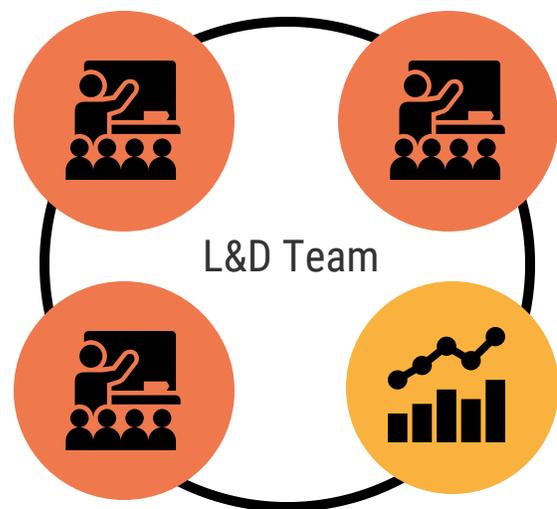
**So what's the solution? The simple answer, to borrow a phrase from Nike, is to "Just Do It!"**

However, if the past ten years is a predictor of the future, that isn't likely to happen. Something new is required, and it needs to start with hiring people with different skill sets into L&D departments.

Specifically, instead of focusing solely on adult learning and instructional design skills, look to hire people with data analytics, statistics, and data visualization skills.

Most L&D departments only need one person with these skill sets, and small departments can seek out someone already in the organization who possesses these skills.

Without doing something different, L&D is likely to see the same results in the next ten years as what has happened in the past ten.



# Up Your M&E Game Today



In addition to hiring people with different skill sets into L&D departments, another part of the solution is to improve the quality of Level 1, 2, 3, and 4 evaluations currently in use. The following tips will help you get started.

## **Level 1 Evaluation Tip: PLAY THE END GAME**

Place questions regarding participant demographics (e.g., name, position, department, and so forth) **at the end of the evaluation form**, not the beginning. Placing demographic questions at the beginning of an evaluation form has the potential dual effect of biasing responses towards the favorable and depressing response rates.

---

## **Level 2 Evaluation Tip: THE LONG RUN**

When writing multiple-choice questions, **avoid having the correct answer be the longest**. We often include more information about the correct answer because we know more about the right answer than the other responses.

---

## **Level 3 Evaluation Tip: ACTION IS THE NAME OF THE GAME**

When using a survey to collect Level 3 evaluation data, focus the survey items on **specific, observable behaviors**, not thoughts or motives. Measuring thoughts and motives produce invalid results. It's impossible to know the thoughts and motivations behind why someone did or didn't do something.

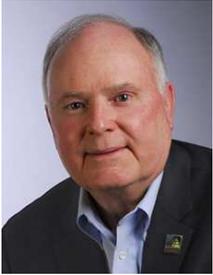
---

## **Level 4 Evaluation Tip: CONNECTIONS COUNT**

When conducting a Level 4 evaluation, it is best to approach the project in two phases. Phase 1 involves identifying business metrics that have a close connection with program content, and phase 2 focuses on connecting the learning program to the business metrics.

*For more more tips, and for additional information go to [www.phillipsassociates.com](http://www.phillipsassociates.com) and click on the "Resources" tab.*

# About Phillips Associates



**KEN PHILLIPS, PhD, CPLP** is the founder and CEO of Phillips Associates and the creator and chief architect of the Predictive Learning Analytics™ (PLA) learning evaluation methodology. He has more than 30 years experience designing learning instruments and assessments and has authored more than a dozen published learning instruments. Ken regularly speaks to Association for Talent Development (ATD) groups, university classes, and corporate training departments. Since 2008, he has spoken at the annual ATD International Conference on topics related to measurement and evaluation of learning.

Prior to pursuing a Ph.D. in the combined fields of organization behavior and educational administration at Northwestern University, Ken held management positions with two colleges and two national corporations. In addition, he has written articles that have appeared in *td* magazine, *Training Today* and *HR.com* and is a contributing author to six books in the learning and development field. Ken earned the Certified Professional in Learning and Performance (CPLP) credential from national ATD in 2006 as a pilot pioneer and was re-certified in 2009, 2012, 2015 and again in 2018.



**JACK BUTLER** has recently retired from corporate life to pursue his passion as an Adjunct Professor in the College of Business and Management at Northeastern Illinois University where he teaches quantitative subjects and Management Information Systems. Concurrently with teaching, he has held a variety of positions developing and delivering technology training across several industries and companies including Motorola, PeopleSoft and, most recently, Medline Industries.

His specialty is working with information-based systems and selected projects have included: the design, development and delivery of training to support the implementation of a web-based system supporting a nationwide sales force of over 1,200 sales professionals, creation of an e-learning training program introducing an automated voice-based warehouse picking system, development of a multi-lingual online training program introducing a quality incident reporting and correction system.

Jack has worked with Phillips Associates on a variety of programs over the past several years and currently serves as the “numbers guru” supporting PLA. His educational background includes a degree in Business / Data Processing and an MBA in accounting and quantitative techniques.