



Application and Impact of Learning Evaluation Executive Summary: *Sample Standard Report*

Program Name

XYZ Company

Prepared by MetrixGlobal®

Date

Given the importance of this learning program for XYZ Company, the Learning and Organization Development team decided to engage a third-party evaluation specialist, Merrill Anderson of MetrixGlobal®, to evaluate the impact of the program.

A web-based questionnaire was developed and administered by MetrixGlobal during May 2008. The timing of this administration gave the participants about three months to apply what they learned. All but five participants (23 of 28) responded to the survey for a response rate of 82%.

The learning program had a significant impact on the participants, on their work groups and on the organization. The participants are now able to more effectively collaborate with peers, communicate with employees and resolve conflict. Consequently, employee engagement has increased and teamwork has improved. The tools and approaches supplied by the Learning and Organization Development team have been very helpful in supporting these new behaviors.

The organization has benefitted as well. The conversion of personal productivity and work group productivity benefits to monetary value produced over \$400,000 in value. This represents a substantial boost in the capacity of the respondents and their work groups to get more accomplished in the same amount of time.

As this program continues to be deployed, it seems worthwhile to explore how to more fully engage the participant's immediate managers in the learning process. In so doing, the reinforcement for behavior change would increase, as well as the immediate managers gaining increased ability to give and receive feedback.



Application and Impact of Learning Evaluation

Sample Standard Report

Program Name

XYZ Company

Prepared by MetrixGlobal®

Date

Introduction

Given the importance of this learning program for XYZ Company, the Learning and Organization Development team decided to engage a third-party evaluation specialist, Merrill Anderson of MetrixGlobal®, to evaluate the impact of the program. The objectives of this evaluation were to:

1. Document what participants learned and how they applied what they learned to the work environment
2. Explore the level of support participants experienced for application of learning
3. Determine the impact that these actions have had on both intangible and tangible benefits for the organization
4. Convert some of the tangible benefits to monetary value in order to gain a sense of the size of the organizational impact of the program, and
5. Make recommendations for how best to move forward with continued development of the program.

A web-based questionnaire was developed and administered by MetrixGlobal during May 2008. The timing of this administration gave the participants about three months to apply what they learned. All but five participants (23 of 28) responded to the survey for a response rate of 82%.

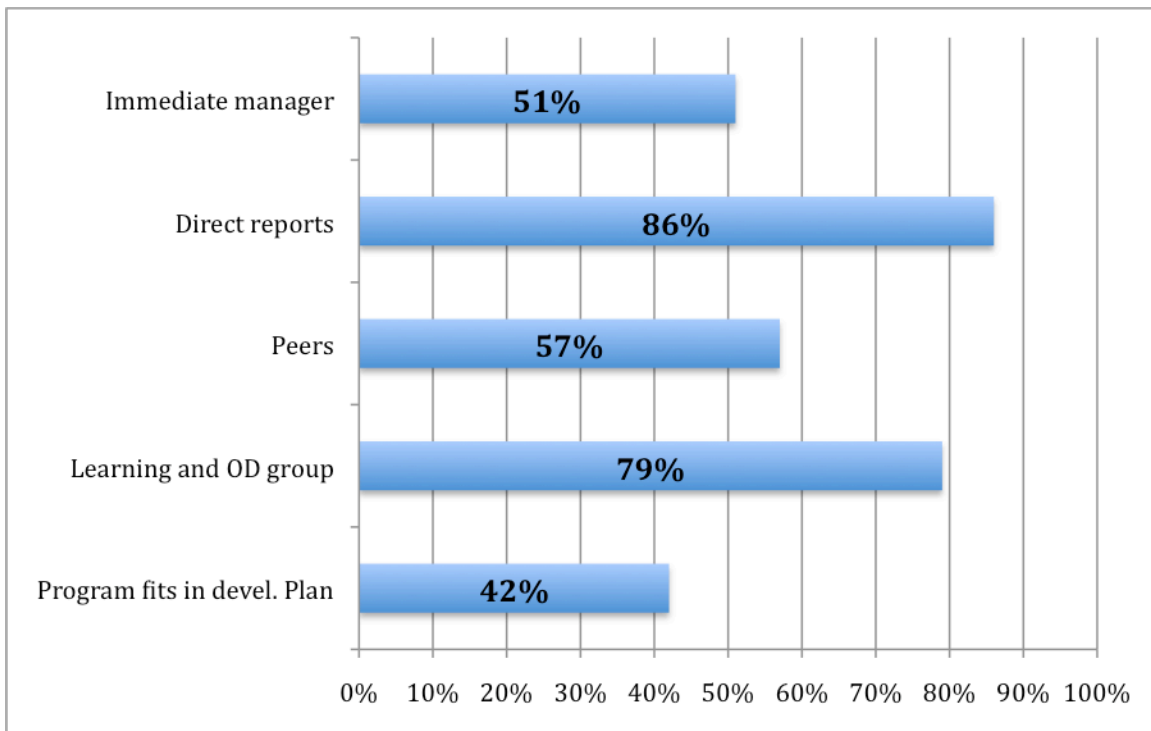
How Learning Was Applied to the Work Environment

Twenty of the twenty-three respondents (87% application rate) cited specific ways in which they have applied what they learned to the work environment. The participants were asked to provide specific examples of how they applied what they learned. A review of these statements revealed the many ways in which this program has improved communications and feedback with direct reports, peers and others. Examples include:

- *"I was able to communicate better with a new employee by expressing the strengths I saw in him and how I thought he could leverage these strengths to make him more successful in dealing with his employees."*
- *"I was able to apply what I had learned to better engage a co-worker while implementing a new project. I was able to get his buy in, frame it up, talk about an action plan and help him get motivated to carry it out."*
- *"Using the coaching model from the program, I enabled a manager to realize the potential benefit of a Lean initiative. This process is very stressful and full of finger pointing, and I was able to articulate a proactive and customer friendly process in a team environment."*
- *"I intervened on a situation between a peer of mine and an employee, which was starting to get out of hand and cause emotions to get in the way. I sat down with my peer and discussed alternative ways to prepare and deliver effective feedback. As a result, the situation was calmed down and both parties effectively resolved the issue at hand. After the meeting between these two parties, my peer thanked me for helping her out by providing appropriate coaching."*

Support Participants Experienced for Application of Learning

Participants were asked about the support they experienced for applying what they learned to the workplace. These results are displayed in Figure 1. Leading the list of supporting influences was the participants' direct reports, with 86% agreeing or strongly agreeing with the statement. This strong support by the direct reports bodes well for continued reinforcement of the behavior change. The Learning and Organization Development group was viewed as supportive by 79% of the participants, which underscores the high value that the participants have for this group's efforts.



Percent of Participants who Agreed or Strongly Agreed with Each Statement Regarding Support for Application

Figure 1

Application and Impact Evaluation

The peers and immediate managers of the participants were viewed as supportive by a little over half of the participants (57% and 51%, respectively). While it may be said that their peer-to-peer interactions may not be as frequent as interactions with direct reports or managers, it may be worthwhile to explore how peer interactions and networking may be bolstered to further reinforce the learning process and behavior change. More disconcerting is the level of support being received from the participants' immediate managers. While 51% say they are receiving support, on the flip side of this, 49% feel that they are not receiving adequate support. Ways to increase the managers' support and reinforcement for the participants could be explored further.

Another area of concern is the relatively low understanding about how the program fits in the respondents' development plans. Only 42% said that they knew how the program fit, which decreases their perception of the relevancy of this program in meeting their development needs. Again, the respondents' immediate managers may be encouraged to play a stronger role in reviewing the development plans of their subordinates and reinforcing the relevancy of the program to meet the respondents' developmental needs.

Impact on Intangibles

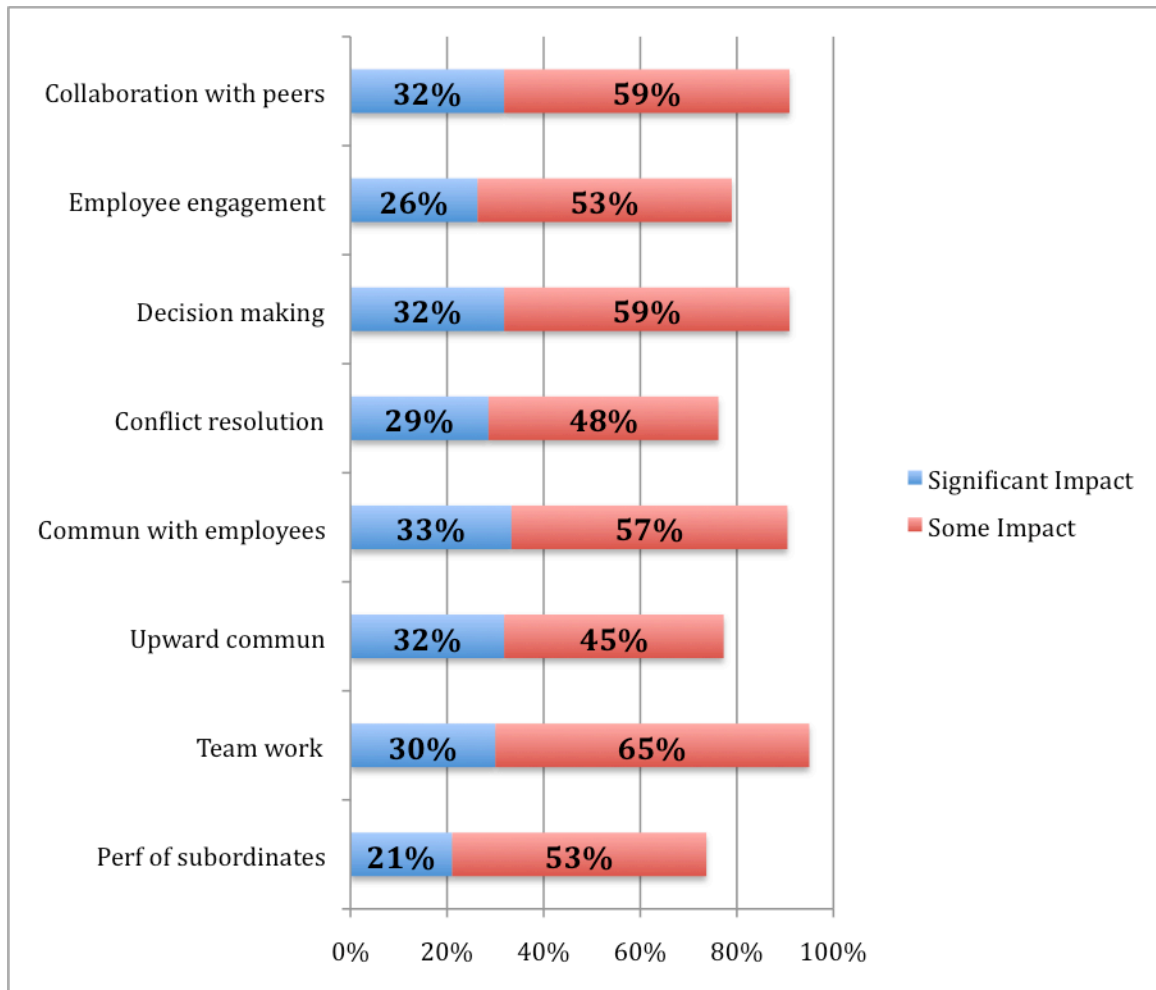
After the respondents described some of the actions they took as a result of participating in the programs, they indicated whether these actions (and other actions taken as a result of the programs) had an impact on each of eight intangibles. Figure 2 presents the results. As can be seen from this figure, 74% to 95% of the respondents felt that the programs impacted each of the intangibles, with anywhere from one-fifth (21%) to one-third (33%) of the respondents indicating that the impact was significant.

This indicates that the programs had a broad impact across a spectrum of important intangible benefits, many of which dovetail with examples of application reviewed earlier. For example, communications and employee engagement were impacted as managers found ways to leverage the strengths of their employees and gain their buy-in to action plans.

Overall, it seems clear that this program created important intangible benefits, especially with increasing communication and engagement with employees. This reinforces the earlier finding that the

Application and Impact Evaluation

participant's direct reports were very supportive of the participants' behavior change. This level of support seems to be bearing fruit for the employees in terms of higher engagement and a mutually reinforcing relationship with their managers as these managers apply what they learned from the program.



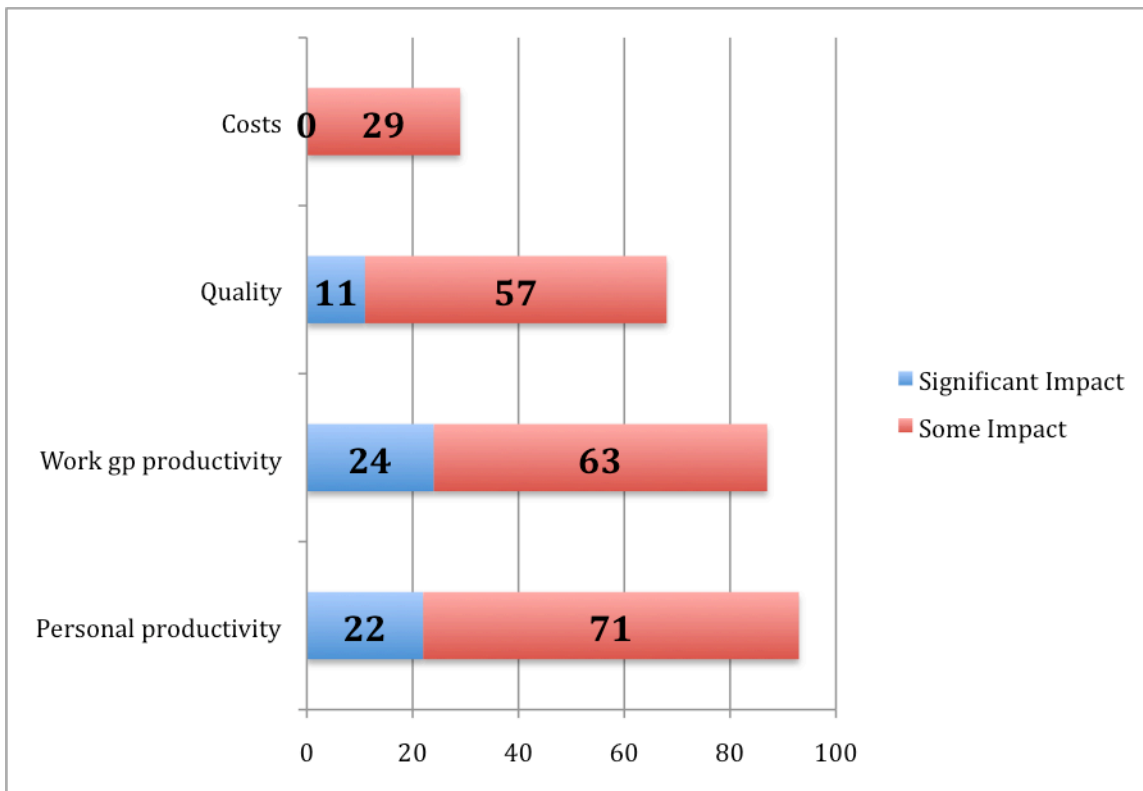
The Percent of Respondents Who Said that the Programs had a Significant Impact or Some Impact on Each of the Intangibles

Figure 2

Impact on Tangible Benefits

The respondents were also asked to gauge the impact of the program on four tangible benefits, which are displayed in Figure 3. Overall, these findings track with the key learnings cited by the respondents and how they applied these learnings to the work environment. Personal productivity and work group productivity were the most impacted by the programs, followed by quality. Cost reduction was the least impacted of the five areas.

Three of these areas – quality, work group productivity and personal productivity – will now be explored further to gain deeper insights into the extent of the impact.



The Percent of Respondents Who Said that the Programs had a Significant Impact and Some Impact On Each of the Tangible Areas

Figure 3

Quality

Two-thirds (68%) of the respondents felt that the program had at least some impact on improving the quality of products or services (with 11% of these respondents saying the impact was significant). Those respondents who indicated that the program impacted the quality of products or services were additionally asked to estimate, on a percentage basis, how much quality had improved. These estimates were not taken at face value; rather these estimates were qualified by asking the respondents three additional questions (this process is drawn from Anderson (2004):

1. What was the estimated percent improvement of quality?
2. How much of this improvement (on a percentage basis) was directly the result of the program? This question is intended to isolate the effects of the program on improving quality from other potential influencing factors.
3. How confident, on a percentage basis, are they in their estimate? This question serves to identify the error of the estimate.

Determining the improvement in quality was done by multiplying these three percentages for each of the eleven respondents who identified a quality benefit. For example:

1. One respondent said that there was a 20% improvement in the services her group provided
2. At least 70% of this improvement was directly attributed to the programs
3. She was 90% confident in her estimate.
4. Multiplying $20\% \times 70\% \times 90\% = 12.6\%$ improvement

The improvement percentages for all eleven respondents were averaged, resulting in a 17.5% overall average estimated improvement in quality for this sub-set of respondents.

Personal Productivity and Work Group Productivity

Over 90% said that there was at least some impact on increasing their personal productivity with 22% saying that this impact was significant. There was a similar impact on work group productivity, with 87% saying there was at least some impact and 24% of these respondents saying this impact was significant.

Increasing productivity means increasing the capacity of people to accomplish more in the same amount of time. In other words, taking actions that free up personal time or other peoples' time. In the conversations with the respondents both personal productivity (e.g., the respondents' productivity) and work group productivity were further explored. Specifically, these benefits were converted to monetary value.

Conversion of Benefits into Monetary Value

Personal productivity and work group productivity can be readily converted to monetary value. The key ingredient for both of these benefit areas is time; specifically, the number of hours gained as a direct result of the program.

Note that these monetary benefits are considered to be "capacity" benefits rather than "cash" benefits. Capacity benefits refer to increasing the time available to accomplish value-add activities. Cash benefits, on the other hand, are benefits that show up on a cash flow statement or a department's budget.

The respondents were asked additional questions according to the following process to convert personal productivity and work group productivity benefits to monetary value. This process is drawn from Anderson (2004).

- Respondents were asked to estimate the range of hours gained as a result of the actions they took. The middle point of each range was taken as the number of hours gained per week.
- The respondents were then asked how many of these hours gained were directly due to the program, which isolates the programs' impact from other potential influencing factors.

Application and Impact Evaluation

- The respondents were asked how confident they were, on a percentage basis, in their estimate, which gives us the error of the estimate.
- Multiplying the number of hours x the isolation factor x the confidence factor gives us our *qualified* benefit.

Converting this qualified benefit to monetary value is done by:

- Multiplying this value by 48 weeks, which annualizes the benefit. Less than 52 weeks are used in order to account for time away from work.
- Multiplying the value by the average fully loaded dollar value of the respondent's time, which converts the benefit to monetary value. The average fully loaded hourly rate for the respondents was \$62, and was \$53 for direct reports in their work groups.

Example: Personal Productivity

One respondent noted that, as a result of the program, she learned how to appropriately say "no" to some work requests and better delegate work in her group. Applying these learnings to the work environment resulted in freeing up some time for her, in fact, four to five hours per week, she estimated.

Actions:	Saying "no" appropriately to some work requests Delegating more work to others
Results:	4.5 hours per week gained
Isolation:	50% attributed to the program
Confidence:	85%
Calculation:	$4.5 \times 50\% \times 85\% \times 48 \times \$62 = \$5,700$

A total of 13 respondents converted their personal productivity gains into monetary value. Combining the monetary value from all 13 respondents produced a total of \$104,000 in monetary value.

Example: Work group productivity

A respondent said that, as a result of what he learned in the program, he was better able to manage work priorities with his team and redirect their work to higher value activities. He estimated that each of his eight direct reports gained four hours per week as a result.

Actions:	Manage work priorities Redirect work to focus on higher value work
Results:	4 hours per week gained per team member There were 8 team members
Isolation:	50% attributed to the program
Confidence:	100%
Calculation:	$4 \times 8 \times 50\% \times 100\% \times 48 \times \$53 = \$40,000$

A total of 8 respondents converted their personal productivity gains into monetary value. Combining the monetary value from all 8 respondents produced a total of \$308,000 in monetary value.

The total (capacity) monetary benefits from personal productivity and work group productivity was \$412,000.

Conclusion

The learning program had a significant impact on the participants and on the organization. The participants are now able to more effectively collaborate with peers, communicate with employees and resolve conflict. Consequently, employee engagement has increased and teamwork has improved. The tools and approaches from the program have been very helpful in supporting these new behaviors.

The organization has benefitted as well. The conversion of personal productivity and work group productivity benefits to monetary value produced over \$400,000 in value. This represents a substantial boost in the capacity of the respondents and their work groups to get more accomplished in the same amount of time.

Application and Impact Evaluation

As this program continues to be deployed, it seems worthwhile to explore how to more fully engage the participant's immediate managers in the learning process. In so doing, the reinforcement for behavior change would increase, as well as the immediate managers gaining increased ability to give and receive feedback.

References

Anderson, M.C. (2004) *Bottom-Line Organization Development*.
Boston, MA: Elsevier Butterworth-Heinemann.

About the Principal Researcher



Merrill C. Anderson, Ph.D. Cylient

Merrill is a business consulting executive, author and educator with over twenty years experience improving the performance of people and organizations. He is currently a principal and chief business architect of Cylient, a professional services firm that offers coaching-based leadership development, culture change and MetrixGlobal® evaluation services.

Merrill has held senior executive positions with *Fortune* 500 companies including chief learning executive and vice president of organization development. He has consulted with over one hundred companies throughout the world to effectively manage and measure strategic organization change. He has over one hundred professional publications and speeches to his credit including his latest book *Coaching That Counts*, co-authored with his wife and leadership coach Dianna Anderson, MCC, that broke new ground by presenting an insight-based leadership coaching process proven to deliver strategic value to the organization.

Merrill was recognized as the 2003 ASTD ROI Practitioner of the Year. His work has been recognized as best-in-class by the American Productivity and Quality Council, the International Quality and Productivity Center, *Training* magazine, the Corporate University Xchange, ASTD and other professional industry groups. He has been widely quoted in the international press on issues of organization change and ROI.

Merrill has served as adjunct professor for graduate learning and organization development programs at Drake, Pepperdine, Benedictine and DePaul universities. He earned his Ph.D. at New York University, M.A. at University of Toronto and his B.A. at the University of Colorado. Merrill lives in Johnston, Iowa with his wife Dianna and their two sons. He may be reached at merrill@cylient.com.