

## Training – impact evaluation

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I hate to think how many days have been spent by busy people in the charity sector attending training events which failed to do “exactly what it says on the tin”. Sometimes this was because very little was said on the tin; in other cases there were plenty of words on the tin, but they didn’t describe the contents in any helpful way.

It is simply common sense that anyone launching a learning event should think through very clearly what they are trying to achieve, not just on the day itself but in the form of longer-term results. There are several models of evaluation but most of them are of limited value for one or more of these reasons:

- They are full of jargon
- They concentrate on the training event itself and exclude the “before” and “after” stages
- They overlook the crucial role of the participant’s line manager
- They use vague language.

So is there a model which overcomes these drawbacks? Yes there is. It’s called the Carousel of Development, originally created for The Work Foundation, a registered charity. “Carousel” because it is a circular process, full of colour (whose significance will be explained in a moment); “development” rather than “training” because the Carousel fits any learning activity – coaching, visits, project teams – as well as a traditional training course.

### The Carousel Diagram ©

## Organisational Scorecard Objectives

<p><b>Financial</b></p> <ul style="list-style-type: none"> <li>•Secure funding to ensure the continuance and future development of sustainable services in line with the Foundation’s strategy.</li> <li>•Maintain and utilise the organisation’s assets and funds in order to support current and future service provision in an open and transparent manner.</li> </ul>	<p><b>Stakeholder</b></p> <ul style="list-style-type: none"> <li>•Provide quality services to all our customers that empower and support them to be fully included in their communities as equal citizens.</li> <li>•Work in partnership with service users and other stakeholders to identify, plan, deliver and evaluate services.</li> <li>•Increase the geographic scope of all our services to promote equal access for all customers across Northern Ireland.</li> </ul>
<p><b>Internal Processes</b></p> <ul style="list-style-type: none"> <li>•Manage business improvement by self-assessing against the EFQM Excellence Model.</li> <li>•Manage Universal Service Delivery process and Core Support Processes to deliver Key Performance Results and policy and strategy.</li> </ul>	<p><b>Organisational Learning and Growth</b></p> <ul style="list-style-type: none"> <li>•Develop our people to deliver the organisation’s strategy and culture of continuous improvement.</li> <li>•Influence key policy makers by developing services that are innovative and exemplars of best practice.</li> </ul>

The colours show the part to be played by all of those involved.

The two red stages are the concern of senior managers. They are interested in business needs (in the charity sector we might call them operational needs) and results. The two green stages involve the learner and his or her line manager – someone who is crucial to the success of the development process. The two blue stages are the province of the trainer or consultant, who also has to pull the whole sequence together.

Straight away you will notice that these contributions by managers are a special feature of the Carousel. The best trainer in the world cannot do it all alone. Let us now trace who does what at each stage:

### **Stage 1 – Identify business needs**

I remember the training manager of a travel company telling me that his chief executive always regarded training as a marginal activity until the day when the training manager produced his annual review of training in a new way. Rather than a catalogue of training events he started with the company's business priorities and then showed the contribution which training had made to each one. So we should ensure that all development is anchored in the organisation's needs. This places the trainer in an ongoing dialogue with senior managers.

Some development will derive directly from an operational issue affecting several departments– e.g. the chief executive might be worried that absence rates are rising; some development will only apply to one individual, e.g. Harry needs to improve his report writing. Either way, the question to ask is: Can training or development make a contribution to the organisation's effectiveness? If so, that should be measurable. In the case of absence levels, a cost saving can be worked out. In Harry's report writing, there may be time saved in redrafting or contracts won by more persuasive reports.

### **Stage 2 – define development objectives**

What exactly are we trying to achieve? Is it to impart knowledge; to improve skills; or to change behaviour? Or is it a combination of these?

Take employment law as an example. Is my development need simply to understand the law better (knowledge); or to learn how to carry out a disciplinary interview (skill); or to have the confidence to tackle a team member who is bullying a colleague (behaviour)?

Umpteen training events are launched without this clarity. A notorious example was a large government department which put masses of employees through an equal opportunities course, in batches of thirty at a time. It was only after several hundred people had gone through the course that the feedback made the organisation pull the plug on the training – it wasn't clear whether it was about legislation, or diversity, or women's career paths.

As well as defining the learning objectives clearly, the other essential at stage 2 is for the line managers of those people who will go through this development to brief them about it beforehand. There was a famous occasion when an internal trainer was opening a course attended by twelve people from across the country. He asked each of them what briefing they had had from their line managers; four of them had had no briefing at all, and the trainer sent them home – the word soon spread about the importance of the line manager's role!

### **Stage 3 – Design learning process(es)**

Now at last the trainer can design the learning event. In the simplest situation, there are ten people with identical development needs, and a two-day course in fundraising techniques will suit them well. But take our employment law example from stage 2: those who need to understand the law could be given a book to read; those who need interview skills might attend a workshop; those who need to tackle bullying might receive coaching. A really good trainer will know the learning styles of all employees and will select the best learning process for each participant individually.

### **Stage 4 -- Experience the learning process(es)**

The participants attend their workshop, or receive their coaching, etc. If appropriate, people who have gone through different processes might meet afterwards to share what they have learned. For example, I recently ran a two-day workshop on business planning for 12 managers from one organisation. As a follow-up, we divided the 12 into four teams of three people; each team visited a different organisation which was skilled at planning. At the time of writing, the four teams are about to come together to make a joint presentation to the board about firstly what they have learned for their own departments' benefit, and secondly how the organisation as a whole can improve its planning next time around.

At the end of the learning event, all participants should be asked for their feedback. This is almost always called "evaluation" (or more commonly, "the happy sheet"). But strictly speaking it isn't evaluation but validation – all that can be done at that point is to say whether the event itself was worthwhile; nothing about its long-term benefits.

### **Stage 5 – Use and reinforce the learning**

This is the crunch stage. The participant's new skills etc must be applied while still fresh. The line manager can help greatly by debriefing the participant and by encouraging him or her to share their new learning with their colleagues. Line managers, particularly at director level, can be valuable role models by being proud, rather than ashamed, of their own ongoing learning. The measurement of improvements may be able to start now.

### **Stage 6 – Judge benefit to the organisation**

You will notice that we say "judge", not "measure". Of course we will measure as much as we can – in the form of cost savings of cost or time, or fewer errors. A company which runs nightclubs once won a National Training Award for a customer care programme for its door staff ("bouncers") where the measure was a reduction in the number of punch-ups!

But there is no need to go to great lengths to produce numerical measures for everything, such as improvements in confidence. These are important and valid results: it is best to anticipate them at stage 2 by agreeing at that early point what will be sensible outcomes to expect. So Linda and her line manager might decide at stage 2 that Linda's confidence in contributing to meetings with partner organisations will be judged by asking for feedback from a colleague who will be attending the same meeting.

Some benefits to the organisation may be evident in a matter of days or weeks; others may take months or years. Again, the appropriate timescale can be decided at stage 2. While the benefits are emerging, new business needs are showing up, so the Carousel sequence comes round again.

Using the Carousel of Development is very unlikely to require an increase in your training budget: quite the contrary. By defining your objectives more crisply you can bring your development activities into sharper focus and achieve that vital dialogue between line managers and trainers.

The Centre for Charity Effectiveness can help charities of all sizes to use the Carousel of Development and to gain real value for money from your learning and development activities. Contact the Centre for more information.