SMR USA Inc
Helping People Learn and Perform

KIRKPATRICK Four Level Evaluation E-Book

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Dr. Jim Kirkpatrick

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chapter one

Fundamentals of Kirkpatrick Four Level Evaluation – Part 1

"Don't be fooled into thinking that just because our senior business partners are not specifically asking for us to demonstrate the impact of training that they don't care!" These words from a senior training manager for a major automobile manufacturer should strike a note of fear in your heart. Or at least, a flutter of caution. Tammy went on to say, "Here is how it works. They do not ask for us to demonstrate the value of our learning initiatives, and even off-handedly mention that they hear good things about our programs. But when budget time comes, and there has been issued a directive to tighten the belt a bit, they show their true colors. Guess who they look to for the first line of cuts? Training!!"

It is, therefore, urgent for all learning professionals to take heed and redefine their role in the training and, more importantly, the business community. Specifically, we need to no longer view training as the design, development, and delivery of training programs. Instead, we need to extend our expertise, our involvement, our influence, our impact, and ultimately our value directly into the world of work and the bottom line of our businesses.

My father, Don Kirkpatrick, developed the four levels of evaluation over 50 years ago, and they are still with us today. Don identified four words that described how to evaluate the effectiveness of a supervisory training program back in the mid-1950's while working on his doctoral dissertation –

> **Reaction** (Level 1, or how training participants thought of their training program);
>
> **Learning** (Level 2, or what knowledge, skills, and attitudes were acquired through the training);
>
> **Behavior** (Level 3, or to what degree did participants apply on the job what they learned); and
>
> **Results** (Level 4, or what results came to be from the training).

Don's model remains the most familiar and the most effective evaluation model on the planet. Oh, there are scoffers and skeptics who think otherwise, but they have not educated themselves as to how the four levels have evolved over the past few years, largely due the work I have done with the four levels. Wendy, Nick (from Edward Jones), Linda and Caroline (from MoDOT) and I will be showing you some practical ways to prepare you for the future challenges of our industry.

What is it, then, that makes Kirkpatrick's four levels the most useful and critical approach going forward? It is the focus on what we call the *Kirkpatrick Business Partnership Model*. In this instance, the business partnership model specifically refers to the relationship between the learning function and the business.

Below are a number of keys to the successful implementation and execution of the Business Partnership Model, through the four levels.

1. Learning is a process, not an event. There remains the strong myth today that training departments, corporate universities, learning functions – whatever you want to call us – are in the business of developing and delivering training programs. Continued thinking along this line will form the first nail in your training coffin. Instead, "training programs" needs to be replaced with "learning events." Research has proven over and over that a single training or learning event is not as effective as a collection of short, targeted, blended learning initiatives. This is especially true when participants have the opportunity to apply what they learn – on the job – in between sessions. Why is this significant? Learning professionals have an urgent need to modify their roles. Research tells us that as much as 90% of corporate learning occurs *outside* of our formal courses and programs. We, therefore, need to become experts in learning that occurs prior to our programs, and afterwards, on-the-job. We then need to extend our *influence* to those areas, then our *impact*, and finally, *our perceived/real value.*

2. Learning initiatives need to be tied to the needs of the business. Now, don't skip over this and say, "Yea, we know that." I am quite sure that most of you know this, but how well are you actually making it come to life? If you are honest, very few. A quick training needs analysis, or a brief discussion with business leaders prior to a major training initiative is typically not enough. You really need to put on your internal consultant hat for this one, earn a proverbial seat at the table with your business partners, and target each learning initiative to actual business needs, problems, or opportunities to get the job done. We have developed a specific methodology for this by taking a fresh look at the popular yet misunderstood *ADDIE Model*. The letters of this model, used mostly by instructional designers, stand for *Analysis, Design, Development, Implementation, Evaluation*. It may come as no surprise to you that the "A" is where this point either stands of falls. The keys words are, "What will success look like to you (our business partners)".

3. "More training!!" is not always the answer. In my travels, I do find that most training professionals are well aware of this. I worked with a healthcare organization recently that is in its fourth rendition of a patient care initiative in six years. All four have similar content, similar delivery methods, and similar desired outcomes. What changes each time is the name. Sound ridiculous? It is, but here is the problem. Each year or so, this training is rolled out, yet it never achieves the desired results? And each time, the learning professionals know that the content was targeted to the desired needs, and that participants left their learning events with the necessary knowledge and skill to achieve the targeted results, *but something happened along the way* that led to underachievement of targeted results. Unfortunately, this organization had no data to determine what factors – other than at Level 1 and Level 2 – actually led to the failure. So, each year when senior executives said, "We need more training (i.e., new learning initiatives), the learning professionals had no choice but to say, "OK", then go about their ADDIE business and reinvent the patient care wheel. Effective implementation of all four levels can easily rectify that situation.

chapter two

Fundamentals of Kirkpatrick Four Level Evaluation – Part 2

I hope that the words in Chapter 1 struck a chord or two for you, and that while you may be somewhat apprehensive about the future of training – and your future - you do have a sense of hope as to something you can do to increase your value to the industry. Following are additional points that are critical in implementing a personal or organizational business partnership model.

4. *Return on Expectations* is the key to business partnership success. Once the needs of the business have been detailed, and it becomes clear that new training is at least an ingredient in the recipe for business success, it is time to really leverage the business partnership model. A colleague of ours, Diederick Stoel, talks about "negotiating value propositions". What he means by that is this. Learning leaders must dialogue with key business stakeholders to identify and agree on expectations for the learning events.

Often, what the business leaders expect are vastly different from what the learning leaders believe they can deliver on. These differences must be negotiated so that the expectations are not only satisfying to the former, but are realistic in the eyes of the latter. Once these rather generic expectations are identified, they need to be converted into *success indicators*. In other words, you must ask and help answer the question, "What will success look like?" This must be done in such a way as to be able to convert them into metrics that then become important Level 4 outcome goals. In addition to determining how to demonstrate the return on expectations, you must also *manage stakeholder expectations along the way*. This means providing Level 2 and Level 3 metrics and indicators along the way, so that a) you can be sure that the Level 4 goals will ultimately be reached, and b) so that you can double check with you stakeholders along the way to ensure that they are confident in what is happening.

5. You had better create value before you try to demonstrate it. Nothing contributes more to the inadequacy of and threat to the future of training than this. Training leaders and even some training associations believe that if training is done in a manner that is enjoyable, relevant, and effective, that somehow it will lead to significant business results. This myth is perpetuated by both learning professionals and business leaders. Many learning professionals truly believe that huddling amongst their own kind, and working diligently on the "DDI" of the ADDIE model will ultimately (and magically) lead to positive business impact. No. It will lead to some impact, but likely not enough for you to keep your job.

Execution is the key to actually achieving the results that the business is looking for. At the risk of alienating non-sports fans, let me illustrate what I am talking about by using an example of the 2007 Super Bowl champion Indianapolis Colts. Here is how the Colts approached their 2006-2007 season. They conducted training camps for all of their players, handed out playbooks for all to memorize, and decided on and posted (probably on a flip chart) end-of-season goals (e.g., win the division, win the conference, and reach the Super Bowl). Then, head coach Tony Dungy addressed the team just prior to the first game, “Well men, we have 16 tough games ahead of us. I want you all to do your very best, and at the end of the season, let’s get back together and see how well we did.”

Why, this is ludicrous! But, many businesses actually conduct themselves that way. They ‘send people to training’, then send them back to their jobs, then hope for the best. Anyone who knows anything about any sport knows that *proper execution on the field is the key to success*. The same is true of business, and targeted Level 3 evaluation (along with coaching, alignment of desired behaviors with incentives, accountability, reinforcement and support) can and will make all the difference between mediocre and exceptional Level 4 performance (just ask the Colts!).

6. Once you have leveraged learning to business success, you better know how to demonstrate it. Don and I recently wrote a book called *Implementing the Four Levels* (Berrett-Koehler, 2007). In it, we use the metaphor of a law firm presenting a case to a court room jury. We have received much feedback that this metaphor accurately and strikingly represents what learning functions need to do to demonstrate their value to the business. While details are provided in the book, I would like to point out a few main principles. First, we need to know that there is a corporate jury lurking out there whether we can clearly identify it or not, and whether they are actively reviewing our case or not. And what is our case? That learning is making a significant contribution to the business. Second, that jury is made up of different types of people with very different personalities.

We need to know who is on that jury (i.e., our key business stakeholders and those who determine our budgets), and gather evidence for value that will be meaningful to them (see mention of ROE above). Third, we need to present our evidence in such as way that it is compelling to them, and will lead them to return a favorable verdict to us.

Well, there you have it. What started out in 1955 as four simple words that can be used to evaluate the effectiveness of training programs have now found their way for you to sandbag your career or learning function to not only ward off but to thrive in our challenging and ever-changing business environment. Let us now look at specific tips I have for each of the four levels.

chapter three

The New World
Level 1 Reaction Sheets

As mentioned previously, Don Kirkpatrick developed the four levels of evaluation in the mid 1950s. He coined the term 'reaction' back then to describe what soon be came to know as "Level 1." Don defines Level 1 (L1) as "The participants' reactions to a training event. It is basically a measure of (internal) customer satisfaction." Today, organizations around the world conduct some form of Level 1 using what they call "reaction sheets", "smile sheets", or "happy sheets". They are surveys typically administered immediately after the conclusion of any type of training event, and are either completed with 'paper and pencil' or online.

These reaction sheets have been passed down through the generations, modified, automated, and are so common that many organizations simply refer to then as "evals." Much data and information can be gleaned from well-constructed reaction sheets to be used to either improve the training or supply evidence for the beginning stages of demonstrating the value of training to the bottom line. I am considered an expert in training evaluation, which is a fair statement since I learned from the legend (my father, Don). Over the past few months, I have had a nagging feeling in the back of my mind about most L1 evaluations not quite hitting the mark. It was just yesterday, as a matter of fact, when the nagging feeling materialized into a crystal clear set of conclusions. In keeping with the Kirkpatrick four level approach, I shall start with the end in mind. It is time for a radical change in the way we construct Level 1 reaction sheets!

Trainers are some of the most caring people on the planet. Nothing makes them happier than to see training participants enjoy their training and learn the knowledge and skills that the program was designed to teach. Unfortunately, as a profession, we are quite self-centered. “Nonsense” you say? I shall not only provide you with compelling evidence as to the truth of that statement, but provide a rather easy way out of our self-absorption. Why? To increase our effectiveness to our business partners.

Take a look at your Level 1 reaction sheet. Go on. I dare you. I will bet that you will find that it is mostly about us and our environment. Check for phrases like, “the facility was . . .”, “the facilitator . . .”, “the exercises were . . .”, the materials were . . .”. Do you want some more? “The course content was . . .”, “which of the topics covered were . . .”, “which of the methodologies were . . .”

You may not yet get where I am going, but you will. What we do is to ask participants – our customers – their thoughts about us and our methods, our buildings, and our coffee. Instead, we should be asking them about them – and how they are experiencing the training event in relation to their needs.

Below, I have developed a chart that will, hopefully, show you what I mean. I have differentiated these two contracting approaches as trainer-centered, and learner-centered. Please assume for me, if you will, a four point Likert scale for each question defined by the terms, 'strongly disagree', 'disagree', 'agree', and 'strongly agree'.

Evaluation Category	**Trainer-centered**	**Learner-centered**
Program objectives	• The program objectives were clearly defined. • The program objectives were covered by the instructor. • The material was the right level of complexity for my background.	• I understood the learning objectives. • I was able to relate each of the learning objectives to the learning I achieved. • I was appropriately challenged by the material.
Course materials	• The course materials were well organized. • The course materials complemented the course content.	• I found the course materials easy to navigate. • I felt that the course materials will be essential for my success.
Content relevance	• The material was relevant to my needs.	• I will be able to immediately apply what I learned.

Facilitator knowledge	• The facilitator demonstrated a good understanding of the material. • The facilitator shared his/her experiences in regards to the content.	• My learning was enhanced by the knowledge of the facilitator. • My learning was enhanced by the experiences shared by the facilitator.
Facilitator delivery	• The facilitator effectively delivered the program material. • The facilitator did a good job of generating participant interaction. • The facilitator used a good variety of instructional methods. • The pace of the program was good. • The duration of the session was good.	• I was well engaged during the session. • It was easy for me to get actively involved during the session. • I was comfortable with the pace of the program. • I was comfortable with the duration of the session.
Facilitator style	• The facilitator managed the program well. • The facilitator allowed for questions during the program. • The exercises and activities were useful.	• I was well engaged during the session. • I was given ample opportunity to get answers to my questions. • I was given ample opportunity to practice the skills I am asked to learn.

Program evaluation	• The test was a fair representation of the program content. • The role plays or simulations were a fair representation of the program content.	• I was given ample opportunity to demonstrate my knowledge. • I was given ample opportunity to demonstrate my skills.
Breaks	• The breaks were spaced at the right times during the session.	• I felt refreshed after the breaks.
Facility	• The lighting was adequate. • The temperature was comfortable. • The coffee was hot	• I found the room atmosphere to be comfortable. • I was pleased with the room set up. • I experienced minimal distractions during the session.

I trust you see where I am coming from. We need to make Level 1 less about us and more about the impressions and feelings about our programs. Learners have enough trouble with thinking that they are being "sent" to training as a reward, punishment, or to earn a 'check' on some training activity sheet. I urge you to consider at least some of these questions in your L1 reaction sheet. It will help put the emphasis more on the learner and less on us.

chapter four

The Key to Evaluating Level 2 (Learning)

I have such mixed feelings about evaluating Kirkpatrick's Level 2 – the degree to which participants have acquired targeted knowledge, skills, and attitudes. On the positive side, it is important to conduct Level 2 evaluations for several reasons. First, it is right and fair to ensure that participants in any type of significant learning intervention actually acquire the pre-determined knowledge and skills. This is necessary for them to be able to successfully apply what they learned (Note: Success at L2 does not necessarily lead to success at L3, which is the transfer of learning to on-the-job behavior.) Second, having some evidence that learning took place is an important link in the *chain of evidence* that I often talk about – the way to demonstrate value of learning to the business.

I often see downsides of Level 2. Too many learning professionals make too big a deal out of it. What I mean by that is this. As I mentioned in the previous chapter, a general weakness of our profession is that we tend to be trainer-centric. While we talk about being "all for the learner", many of our activities demonstrate that we are all about "the trainer". Level 2 is no exception. We often conduct pre and post knowledge tests whether they are needed or not. Pre and post tests are designed to tell how much learning has taken place as a result of a learning initiative (or training event).

Sometimes this is important, and sometimes it isn't. My strong suggestion is that you make a conscious decision whether this effort is indicated before you undertake it. The reason I say this is that it takes a lot of effort to create tests. Validity and reliability issues are very complicated. And I have seen many excellent learning initiatives get railroaded by complaints about poorly-developed tests.

In fact, I have seen examples where participants actually did worse on post test than they did on pre-tests. In one particular case, a client asked me, "Jim, our pre and post tests indicate that participants did not learn what we taught them, but our Level 3 scores indicate that they actually are successfully applying what they learned. Which should we believe?" My answer was, "well, I would believe what I see. I believe that the Level 3 indicators are accurate, and that your tests were flawed. "

Second, there is too much emphasis on evaluating knowledge for skills-based courses. Personally, I teach 2-day and 4-day programs on four level evaluation. Much of what I teach is skills-based, so I make sure that when I am evaluating how well people are learning, that I use methods that include breakout groups, presentations, and other means of observing the demonstration of knowledge rather than the reporting of knowledge.

What upsets me most about misusing Level 2 is that colleagues and clients often tell me, "we are so busy with evaluating learning that we never get to Level s 3 or 4." What do I suggest you do with all of these issues? Read on.

1. Use skills-based evaluation/testing for skills based programs.
2. Use knowledge-based evaluation/testing for e-learning modules that precede instructor-led programs.
3. Strongly consider the word credibility. This means it is important to discuss the topic of Level 2 evaluation with your business stakeholders in order to determine what evidence they would find credible. They may want statistically significant data, and they may not. You may find that you are spending a lot of time and money when no one really cares (Note: I find that business partners are more interested in evidence of Level 3 drivers and Level 4 outcomes than they are Level 2).
4. Strongly consider using formative evaluation methods. This means evaluation methods that occur during training programs, not afterwards. Make sure these are woven into your instructional design models so facilitators/instructors provide participants with ample opportunity to demonstrate that they have learned.
5. Use pre and post tests only when they serve a purpose. If you need to do a "short version" of this and high validity is not necessary, consider asking participants after a program to rate each learning objective as far as their understanding

or competency before the program versus after the program.

6. If you need to develop valid, credible tests, hire experts. Automate whenever possible.

chapter five

The Missing Link – Kirkpatrick's Level 3

I opened the last chapter with the words, "I have such mixed feelings about evaluating Kirkpatrick's Level 2". Well, I have no such mixed feelings about Level 3 – the degree to which participants have applied what they have learned to on-the-job behaviors. It is always a pleasure for me to write about what I call, "The Missing Link" – the critical bridge between learning and results.

Learning professionals the world over are terrific at designing, developing, and delivering training programs. Likewise, HRD professionals are great at developing and rolling out policies, procedures, and processes to their employees. Neither, however, are very good at ensuring that training participants actually apply what they learn, or that employees actually follow policies, procedures, and processes.

And why is this important? Because if training participants don't do what they are supposed to on the job, and employees don't follow procedures – all of which are designed to help execute an organization's strategy – then simply put, that strategy will not be achieved. It is all in the execution of the plans, learnings, policies, processes, and procedures that actual work gets done, yet that critical element of every successful organizational venture largely remains what I call "no man's (male and female) land."

Training and other HRD professionals seem to think that their job ends when participants leave a training room, or when new policies have been emailed to employees. "Execution", they say, "is the job of the business." Contrarily, the business leaders typically believe that it is the job of training and other HRD professionals to ensure application and compliance, which, of course, will naturally occur as a result of training events and emailing new policies. Managers and supervisors don't have time to 'babysit' their employees to make sure they comply with new behaviors. After all, they are adults!

Unfortunately, human nature is such that, in talking about the masses, this doesn't happen. Along with this, HRD professionals are often concerned that their business partners do not respect or value the contribution they make. The good news is that we can provide an answer to the missing link, while at the same time increasing our contribution to the bottom line. If that isn't enough (and it isn't), we can also use Level 3 to help create a chain of evidence clearly showing that our training and other HR efforts indeed do make a significant impact to the business.

Here are some suggestions as to how to go about leveraging Level 3 to make that all happen:

- Decide first of all that Level 3 is not as hard as some people make it. Decide that you are going to select a few key programs or processes to begin showing it's power.

- Research the different Level 3 methods and tools and determine which will
  - a) fit your program and process needs, and
  - b) which will be best suited to your culture. Some of the best methods are surveying, conducting focus groups, observation/ feedback/coaching, work review, action plan monitoring, and action learning.

- Research the best way to build and administer your surveys or other methods. There are a lot of resources available, including books by my father and myself on four level evaluation.

- Pre-position Level 3. By this, I mean that you must prepare managers for their role in observing and supporting Level 3 methods, and you must prepare the learner as well. This can be done prior to training or policy roll-out, and during (e.g., letting participants know that there will be follow-up for them after training, the purpose of which is to help them apply what they learn to
  - a) better themselves, and
  - b) make a contribution to the organization.)

- Make sure as you develop your tools that you ask only what information that you will find useful. This typically consists of:

- o To what degree are you applying what you learned?
- o If you aren't, why not (provide drop down options or similar assistance)
- o If you are, share your success so we can pass it along
- o What kind of impact are you seeing from your new efforts (sneaking in a bit of Level 4)

- Consider using Level 3 immediately after key leaning events or critical policies, as it will act as a reinforcer of the new behaviors. There is nothing worse than telling people that "this training" or "this new policy" is important, and then providing little or no reinforcement.

- For mission-critical programs, more than one method of assessing Level 3 is advised. With all due respect, it is generally not credible just to ask the participant/employee if he or she is applying their new learnings.

Best of luck with this. Now, on to Level 4.

chapter six

Getting to What our Stakeholders Want – Level 4

Most training professionals think that Level 4 – results – is the most difficult level. In one sense it is, and in another, it is the easiest of all the levels. It is easy in the sense that most of the metrics we use for Level 4 are already being collected by someone other than us. Case in point. Lets say that the expectations of our business partners (the reason we are in business) are as follows:

- improve profits
- increase market share and customer retention
- increase employee engagement and subsequent retention.

These metrics are already being tracked by either the relevant line of businesses (the first 2 bullets) or Human Resources (the third bullet). We, therefore, likely have easy access to pre and post data as we put together our Chain of Evidence (as to the value of our learning process).

Level 4 is also the hardest level – to connect to the initial training events. Remember that the best way to show the value of our initiatives to our stakeholders is to gather evidence – objective data and subjective testimonials – and present it in a compelling manner as a chain. This chain is about "connecting the dots" much as an attorney does in a courtroom during "closing arguments". The major difference is that we are trying to connect the dots through the four levels: positive feedback to the delivery and content of our programs (Level 1) facilitated to measurable, intended acquisition of knowledge, skills and attitudes on the part of our participants (Level 2), which in turn led to the application of those skills on the job (Level 3) which made a strong contribution to "moving the needles" of the metrics that were decided upon.

That is ultimately how we conduct Impact Studies. Impact studies allow us to show the relative value that training and reinforcement (i.e., The Business Partnership Model) provided to the bottom line. But how we get to that point, particularly in reference to level 4, is worth discussing.

I just demonstrated an important point of Kirkpatrick Four Level evaluation – starting with the end in mind. The end in mind is that we want to have a nice complement of facts and testimonials that will convince a business leader that we indeed do make a significant contribution to the bottom line. But before we can do that, we need to find out just what metrics we will use to ultimately tie our efforts to.

Here is how I suggest you do it. When a business leader asks you to develop and deliver a program, make sure you go through a process of finding out the reasons for the request. First, find out the business need, opportunity, or problem that prompted the request. Next, determine if indeed training would be a strong component to meeting those needs. After determining that training is indicated, discuss and negotiate just what the expectations of the senior business leader(s) in regards to the is going to training and subsequent reinforcement process is.

And then, most importantly, work with them to convert those generally generic expectations to *measurable or observable outcomes.* You can get to this by asking, "What will success look like to you." While you may get either shallow answers or no answer at all, keep at it until you are both satisfied that the list of metrics you come up with are both realistic for you to impact, and meaningful in the eyes of your stakeholders. This negotiation process is critical to developing clear expectations, which allows you to focus efforts of training development and delivery, and subsequent reinforcement that will directly impact those metrics.

You may have to keep asking the question, " . . . in order to . . ." Here is an example of how that works. Say your stakeholder – let's call him George - wants a new coaching program. Asking him the question,

"What will success look like to you" results in a response,

"I just want all my leaders to be good coaches."
"In order to what . . .?"
"in order to have them interact properly with their direct reports"
"In order to what . . ?
"in order to have them encourage them"
"In order to what . . .?"

"In order to increase their engagement, loyalty, and retention"
"OK!!!!"

Prior to working your plan and gathering your evidence, the final step in this is to negotiate the *conditions* or *drivers* under which the results will be realized. This is VERY important – critical to achieving the desired results. Here, you want to identify the reinforcers that have to occur *after training* that will ensure that the transfer of learning to key, on-the-job behaviors will occur. These behaviors, when they become standard operating procedure, will lead to the desired results. Often times, you will need to negotiate and even build a business case for supervisors, managers, and executives to fill key roles in the form of accountability and support that will ensure this transfer, which will thus (hopefully) lead to the successful execution of the goals and outcomes.

Following is a quick inventory that I call the *Business Partnership Quiz.* It will provide you with some clues as to how strong the business partnership model is alive in your organization. Please take it, consider the results, consider relevant information in the previous chapters, then take the time to write out and execute some action steps. Feel free to let me know how it goes, or if you have any questions.

Business Partnership Quiz

Instructions

- Review the 15 statements below.
- Each is designed to address an important component in the formula for the successful execution of training in such a way that the bottom line is positively impacted.
- Objectively answer each with a rating depending on the degree to which your learning area is currently practicing each.

Rating	**Ratings: 3= high 2= medium 1=low**	
	1.	My learning function receives frequent and relevant requests for learning interventions from line of business leaders in regards to their business problems, needs, or opportunities.
	2.	We have a good process by which we are able to determine whether business requests are truly training-related versus other issues.
	3.	Our program development processes are such that they align very well to business needs.
	4.	When gathering needs assessment information from business stakeholders, our process includes negotiating expectations and identifying 'what success will look like' at Levels 3 (behavior) and 4 (results).
	5.	We engage Subject Matter Experts in the design and development of our programs.
	6.	Prior to training, managers/supervisors sit with participants and share expectations for training, and subsequent application back on the job.

Rating	**Ratings: 3= high 2= medium 1=low**	
	7.	We utilize business leaders in the delivery of key programs.
	8.	We establish specific job competencies, and weave them into training.
	9.	We are able to effective use evaluation to eliminate 'snags' at Levels 1, 2, and 3, to ensure that training provides maximum value at Level 4 (results).
	10.	We have conducted effective (training) impact studies in order to demonstrate the value of learning to the business.
	11.	We effectively use Level 3 to discover if the lack of on-the-job application of knowledge and skills is caused by training or the culture of the business unit.
	12.	We receive effective partnering from business managers and supervisors through effective feedback and coaching of their direct reports, in order to maximize the impact of training.
	13.	We have developed effective job aids for both participants and managers to leverage what is learned in training.
	14.	We effective utilize technology to streamline training and evaluation.
	15.	We utilize effective presentation skills to be able to demonstrate the value of learning to the bottom line.
	TOTAL SCORE	

RATING SCALE:

45 – 40	Excellent
39 – 33	Very good
32 – 27	Good
26 – 21	Fair
20 – 15	Poor

BUSINESS PARTNERSHIP GOALS

Goal	
What success will look like (metrics)	
Key actions I will take	
Timeline (checkpoints, deadline)	

Goal	
What success will look like (metrics)	
Key actions I will take	
Timeline (checkpoints, deadline)	