Kirkpatrick Then and Now: A Strong Foundation For the Future

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Don (left) with Senator John. F. Kennedy 1959

Techniques For Evaluating Training Programs

Because of his knowledge and experience in the field of Evaluation, we have asked Dr. Donald L. Kirkpatrick of The University of Wisconsin to write this series of four articles.

Each article will deal with one step in the Evaluation Process as Dr. Kirkpatrick sees it. Emphasis will be on techniques which training directors can use to evaluate their own programs.

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This series of articles is based on the following assumption: That one training director cannot borrow evaluation results from another; he can, however, borrow evaluation techniques. Therefore, the techniques used by various trainers will be described without detailing the findings. Each of these four articles will discuss one of the evaluation steps, which can be summarized as follows:

Step 1 - REACTION

Step 2 - LEARNING

Step 3 - BEHAVIOR

Step 4 - RESULTS

These articles are designed to stimulate training directors to increase their efforts in evaluating training programs. It is hoped that the specific suggestions will prove helpful in these evaluation attempts.

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[1] Also see "The Most Neglected Responsibilities of the Training Department," by Dr. Kirkpatrick in the April 1959 *Journal*.

Chapter 9

Kirkpatrick Foundational Principle #2

Return On Expectations^{SM} (*ROE*^{SM}) is the Ultimate Indicator of Value

Kirkpatrick Foundational Principle #2 is "Return On Expectations (ROE) is the ultimate indicator of value". If we don't get this one right, over the next few years the training industry as we know it may become extinct. Training professionals need to be able to bring value to the business, and then demonstrate that value.

> **Return on Expectations^{SM} (ROE^{SM})**: What a successful training initiative delivers to key business stakeholders demonstrating the degree to which their expectations have been satisfied.

Your Corporate Jury Defines Your Value

Our corporate jury judges our value, so we need to know what they expect of us, deliver it, and then be able to show that we did. We call this concept Return On Expectations (ROE). We firmly believe it is the best way to demonstrate the value of our training and reinforcement efforts. Why? Because it always presents bottom line results and value in words and numbers that are the most meaningful to our customers – our business stakeholders – because *they defined them in the first place*.

> **Corporate Jury**: The individual or group of business partners who ultimately judge the degree to which training efforts add value to the business in relation to their costs. This group subsequently controls or influences training department budgets, staffing, and future.

Principle #2 is where training professionals must humbly accept the fact that they largely *support* initiatives; typically they do not *create* or *drive* them. Wendy worked in a training department in the past that would poll the business stakeholders on what they wanted, then systematically shoot down the requests and just do what they thought was right. This is a formula for training extinction. The role of the training group is to support the key business initiatives of a company. The key business stakeholders almost always drive those initiatives.

Define Your Jury

The first step in achieving stakeholder ROE is to determine just who makes up your jury in the first place. This is not always as obvious as it sounds. Consider all parties that will be interested in whether or not you produce positive results. This can include executives, managers, customers, and the training participants themselves. Through business partnership, define the key stakeholders whose expectations will be the most important for you to satisfy.

> **Business Partnership:** Cooperative effort between the training department and other business and support units in the company.

Define What Evidence Is Needed

It is important to not only know what success will look like to your key business stakeholders, but how they want to see evidence