

EVALUATING LEARNING



INTRODUCTION

Evaluating Learning can take many forms, including surveys of learner reaction (sometimes called “smile sheets”), knowledge tests, skill demonstrations, comparisons of pre- and post-learning performance, and calculations of return on investment.

The overall purpose of *Evaluating Learning* is to determine the effectiveness of the learning and whether performance and business objectives were met. This is sometimes called “summative” evaluation. In the *Designing Curricula* and *Designing Learning Experiences* categories, we focused on what is sometimes called “formative” evaluation. We’ve called it “validation.”

Evaluating Learning is an ongoing process that starts with *Assessing Performance Needs*, and continues through *Designing Curricula* and *Designing Learning Experiences*, *Facilitating Learning*, and *Supporting the Transfer of Learning*.

A comprehensive evaluation of learning determines whether a learning solution has affected business results. Business results are usually evaluated six to 12 months after implementation of the learning experience.

In order to determine that the learning solution has affected business results, you must first assess the extent to which the learning has had an impact on performance outcomes. Changes in performance outcomes are usually evaluated a few weeks to several months after implementation of the learning experience.

To ensure that participants are adequately prepared to apply their learning outside the class, you must assess whether learners have acquired the requisite skills and knowledge. This should be assessed against specific learning objectives during implementation of the learning experience. To assess the participants’ reactions, you can have them evaluate their reactions during or immediately after implementation of the learning experience.

A commonly used framework for *Evaluating Learning*, developed by Donald Kirkpatrick, outlines four levels of evaluation.

KIRKPATRICK'S FOUR LEVELS OF EVALUATION	EVALUATING LEARNING COMPETENCIES
1. Reaction	1. Evaluate participant reaction
2. Learning	2. Evaluate learning comprehension
3. Behavior	3. Evaluate transfer of learning (application)
4. Results	4. Evaluate business results (impact)

Competent evaluation of learning increases the likelihood you:

- Identify appropriate and realistic measures for each level of evaluation.
- Produce effective learning that is useful for participants and the organizations to which they belong.
- Gain a comprehensive perspective of modifications that can improve future learning experiences.

In emerging markets, culture, infrastructure, safety, and personal circumstances can challenge evaluation efforts. When you address these challenges directly, you tend to get more accurate and insightful data, which helps with continuous improvement efforts for the program and for proving its impact and value.

As you prepare to evaluate, ask yourself the following questions:

- In what language will you receive the most in-depth feedback from participants? Is a translator needed?
- How can you collect and evaluate data in a way that is economically feasible for both the participants and the sponsoring organization?

- What evaluation methods will work best, given the logistical, technical, and infrastructure realities of the area where the participants live or work?
- What digital methods can you use to collect data?
- How will you incorporate local societal, religious, political, or legal realities and gender norms into the methods used to collect data?
- Do your evaluation questions address the family challenges that women face when applying their learning?
- Was the venue conducive to learning? Did it feel safe and secure?
- Were there any disruptive behaviors towards men and/or women participants during the program and how did it affect their attendance, participation or engagement?

For additional information on *Evaluating Learning*, when conducting training in fragile and conflict-affected situations and gender- inclusive training, please refer to the FCS and gender supplements at the end of this guide.

EVALUATING LEARNING

COMPETENCIES AND SUPPORTING COMPETENCIES | This section contains information about the importance of mastering the competencies, tasks for each supporting competency, key outputs, and assessment criteria.

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1. Evaluate participant reactions

Importance





The impact of mastering these competencies is that you:

- Identify opportunities for improving the facilitation and design of the learning experience.





Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:



1a **Develop materials to evaluate participant reactions** See *Designing learning experiences 4g* and the following:

- ▶ Develop material that is gender-inclusive and culturally appropriate  
- ▶ Determine viability of data collection methods including digital  

1b **Assess participant reactions**

- ▶ Collect and aggregate data to assess participant reaction
- ▶ Identify patterns and trends in participant reactions
- ▶ Identify factors other than learning that might affect participant reactions
- ▶ Document learnings related to technology and logistics
 - ▶ Determine how access or lack of access to technology has supported and hindered learning  
- ▶ Evaluate effectiveness of using women role models in registration, attendance, and active engagement in the program, as well as program completion 
- ▶ Document participants' psycho-emotional learning needs 

1c **Recommend changes based on participant reactions**

- ▶ Identify potential changes to design and facilitation, based on assessment of participant reactions
- ▶ Determine the feasibility of identified changes
- ▶ Recommend changes to improve design and facilitation
- ▶ Decide how responses to the program and training should be communicated, taking into account cultural and religious norms, political circumstances, and gender norms and behaviors  

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Materials to evaluate participant reactions	Evaluation method is clear and easy to complete
	Evaluation method captures relevant data (for example, confidence in applying new skills on the job, effectiveness of instructional methods and materials)
	Evaluation method uses technology (where possible) to simplify data collection and reporting
Assessment of aggregate participant reaction	Results identify patterns and trends in participant reactions
	Results should reflect areas for improvement, as well as areas that worked well
	Results should include both quantitative and qualitative results (for example, answers that can be averaged and individual comments)
	Results identify factors that affect participant reactions
Recommended changes to design and facilitation	Recommendations are based on valid and reliable data
	Recommended changes support achievement of learning objectives
	Recommendations are feasible given budget, timing, resource, and other project constraints

2. Evaluate learning objectives

Importance

The impact of mastering these competencies is that you:

- Determine whether participants have achieved the learning objectives, individually and collectively.
- Provide certification of learning, where required.
- Identify opportunities for improving the design and facilitation of the learning experience.

Supporting competencies and tasks






These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

2a Write learning objectives

See *Designing Curricula 3a*

2b Design evaluation of learning objectives

See *Designing learning experiences 2b* and the following:

- ▶ Determine viability of data collection methods including digital  
- ▶ Collect gender-disaggregated data in a gender-inclusive and culturally appropriate manner 
- ▶ If not all data can be collected during the learning experience, arrange for safe venues and transport during post-program data collection  



2c Develop materials to evaluate learning objectives

See *Designing learning experiences 2c*


2d Assess individual achievement of learning objectives

See *Facilitating Learning 5b*

2e Assess aggregate achievement of learning objectives

- ▶ Compile data on individual achievement of learning objectives
- ▶ Analyze aggregate data on achievement of learning objectives
- ▶ Identify patterns and trends in achievement of learning objectives
- ▶ Identify factors that affect achievement of learning objectives  
 - ▶ Evaluate quality of venue and update security information for future programs in the region
 - ▶ Identify any issues of sexual harassment that occurred in your program
 - ▶ Document legal learnings and share lessons learned about addressing legal needs
 - ▶ Evaluate the digital solutions used in the program
 - ▶ Establish baseline economic data and identify macro-economic issues that affected program results

2f Recommend changes based on evaluation of learning objectives

- ▶ Identify potential changes to design and facilitation based on evaluation of learning objectives
- ▶ Determine feasibility of identified changes
- ▶ Recommend changes to improve design and facilitation
- ▶ Plan for implementing changes and for providing updates and refreshers to participants
- ▶ Communicate program results in a gender-inclusive and culturally appropriate manner 

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Evaluation methods for learning objectives	Design of evaluation is appropriate to the levels of learning objectives
	Design of evaluation ensures that the outcome is observable
	Design of evaluation identifies assessment and administration procedures (for example, scoring, opportunity to retry)
	Design of evaluation is consistent with project constraints
Materials to evaluate learning objectives	Materials to evaluate learning are appropriate to the levels of learning objectives
	Materials to evaluate learning enable observation of achievement of learning objectives
Assessment of individual participant performance	Individual participant performance is assessed against each learning objective
	Individual participant performance is assessed as designed
Assessment of aggregate participant performance	Patterns and trends in achievement of learning objectives are identified
	Factors are identified that affect the achievement of learning objectives
Recommended changes to design and facilitation	Recommendations are based on assessment of aggregate data about participant performance
	Recommended changes support the achievement of learning objectives

3. Evaluate the transfer of learning

Importance

The impact of mastering these competencies is that you:

- Determine whether the learning solution affects performance outcomes.
- Identify opportunities for improving the transfer of learning to the workplace.

Supporting competencies and tasks


These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a Develop a plan to evaluate the transfer of learning
See Assessing Performance Needs 4d



3b Identify desired performance outcomes
See Assessing Performance Needs 2c

3c Develop materials to evaluate the transfer of learning
See Designing Learning Experiences 4h

3d Assess the transfer of learning to the workplace

- ▶ Gather data to identify gaps between pre-learning, current, and desired performance outcomes
- ▶ Interview former participants to ascertain the application and impact of the training on their work or lives
- ▶ Identify factors other than the learning that might affect performance outcomes
- ▶ Assess the impact of learning on performance outcomes
- ▶ Determine barriers to the transfer of learning (for example, software not working as expected, supervisors not supporting performance)
- ▶ Evaluate how women's family factors impact their ability to transfer the learning 
- ▶ Determine how access or lack of access to technology has supported or hindered the transfer of learning

3e Recommend changes based on evaluation of the transfer of learning

- ▶ Identify potential changes to the design and facilitation based on how the learning solution has affected performance outcomes
- ▶ Identify potential changes to support the transfer of learning based on how the learning solution has affected performance outcomes
- ▶ Determine the feasibility of identified changes
- ▶ Recommend changes to improve the impact of the learning solution on performance outcomes
- ▶ Decide how to communicate longer-term program results, taking into account cultural and religious norms, political circumstances, and gender norms and behaviors  

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan to evaluate the transfer of learning	Plan identifies what data to gather and analyze
	Plan identifies when to conduct evaluation
	Plan includes benchmarks of pre-intervention performance
	Plan includes an estimate of resources required to implement evaluation plan
Materials to evaluate the transfer of learning	Evaluation is clear and easy to complete
	Evaluation captures relevant data (for example, uptake of new skills, proficiency in applying new skills, and barriers to the transfer of learning to the workplace)
	Evaluation uses technology to simplify data collection and reporting
Assessment of performance results	Gap between pre-intervention, current, and desired performance outcomes is identified
	Results are stated in terms of specific performance outputs
	Results are based on accurate and reliable data and sound analysis
	Cause-effect relationships are determined among performance gaps
	Assessment determines appropriateness of desired performance outcomes in light of actual performance data
Recommended changes to learning solutions and their transfer	Recommendations are based on analysis of how the learning has affected performance
	Recommendations continue to support the achievement of learning objectives
	Recommendations are realistic for the organization and work unit
	Recommendations are based on identified barriers to the transfer of learning
	Recommendations continue to support the achievement of learning objectives
	Recommendations are realistic for the organization and work unit

4. Evaluate business results

Importance

The impact of mastering these competencies is that you:

- Determine whether the learning solution affects business results.
- Identify opportunities for improving the learning and other performance solutions.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:





4a **Develop a plan to evaluate business results for learning solutions**

See *Assessing Performance Needs 4d*

4b **Identify business measures**

See *Assessing Performance Needs 2c*

4c **Assess business results**

- ▶ Gather data to identify gaps between pre-intervention, current, and desired performance outcomes
- ▶ Identify factors other than performance outcomes that might affect business results (for example, political instability and social unrest) 
- ▶ Assess the impact of learning on performance outcomes and subsequent business results
 - ▶ Evaluate improvements in confidence and leadership skills, if applicable 
 - ▶ Evaluate the effectiveness of coaching and mentoring 
 - ▶ Evaluate effectiveness of networking (peer-to-peer or business-to-business) 
- ▶ Collect pre-program and post-program economic data for the target group to determine whether the program had any direct effect on the participants' economic situation
 - ▶ Gather proof of any economic changes that can be directly attributed to the program

4d **Recommend changes based on the evaluation of business results**

- ▶ Identify potential changes to the design and facilitation based on how learning solution and performance outcomes have affected business results
- ▶ Identify potential changes to the support for the transfer of learning based on how learning solution and performance outcomes have affected business results
- ▶ Determine feasibility of identified changes
- ▶ Recommend changes to improve the impact of the learning solution on performance outcomes and subsequent business results

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Plan to evaluate business results	Plan identifies what data to gather and analyze
	Plan identifies when to conduct evaluation
	Plan includes benchmarks of pre-intervention business results
	Plan includes an estimate of resources required to implement evaluation plan
Assessment of business results	Gap between pre-intervention, current, and desired business results is identified
	Results are stated in terms of specific existing business measures
	Results are based on accurate and reliable data and sound analysis
	Cause-effect relationships are determined among intervention, performance outcomes, and business results, if possible
	Assessment determines the appropriateness of business measures in light of actual business results
Recommended changes to learning solution (including support for transfer)	Recommendations are based on analysis of how the learning solution has affected performance outcomes and subsequent business results
	Recommended changes support the achievement of desired performance outcomes
	Recommendations are realistic for the organization and work unit