By Stephen Smith

Why Follow

Levels When

You Can

BUILD BRIDGES?

In *Presenting Learning* Tony Bingham and Tony Jeary ask workplace learning and performance (WLP) professionals to speak the language of business and contribute to business results. Their advice includes connecting our WLP work with the business opportunities facing our organizations and executives.

Bingham and Jeary advocate WLP professionals to get to and stay at the table, "where all strategic and important business decisions are discussed." In reviewing *Presenting Learning*'s lessons, it occurred to me that bridges could be built between WLP professionals, our measurement and evaluation practices, and the organizations that we serve.

Changing the traditional measurement levels discussion toward a bridge-building analogy sparked several new perspectives regarding what it is that WLP professionals accomplish and what can happen when we think outside of the classroom.

Current state of measurement and evaluation

Attend any WLP conference or read any of the measurement and evaluation literature, and the conversation ultimately turns to levels. Kirkpatrick's four-level work, based on Katzell's four-step measurement approach, or some variation, often dominates the discussion. The discussion shifts subtly from how the WLP program aligns and attunes with the organization and what can be accomplished with the output and outcomes, toward how many measurement levels have been, could have been, or should be applied.

The conversation then shifts from how many levels that were applied to a single WLP resource, class, and program, toward the application of the four levels to an ever increasing number of WLP resources, classes, and programs. The general thinking is that the more measurement levels that can be applied across a growing number of programs, the better off we will be, assuming that there are available resources.

During my WLP career, I experienced instances where applying the Katzell-based Kirkpatrick four-level measurement approach improved the quality of classes and programs. However, in several instances, I experienced times at which one or more of the four levels caused my business executives to wonder why I kept insisting on stepping through those levels. They wondered why business results were always measured last—often after too much time had passed to do anything meaningful with the results, at least according to the executive's reckoning of time.

The executive's reasoning was that the information was great, but that it would have been better to have the information to act on much earlier. Wondering if I was alone in these experiences, I sought out other WLP

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Raymond Katzell's "Hierarchy of Steps"

STEP ONE. To determine how trainees feel about the program.

STEP TWO. To determine how much the trainees learn in the form of increased knowledge and understanding.

STEP THREE. To measure the changes in the on-the-job behavior of the trainees.

STEP FOUR. To determine the effects of these behavioral changes on objective criteria such as production, turnover, absenteeism, and waste.

Source: "How to start an objective evaluation of your training program." *Journal of the American Society of Training Directors*, 1956

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professionals. Numerous conversations identified WLP professionals enduring similar experiences. In my professional practice, I focused on what I called "predictive return-on-investment."

I based predictive ROI on understanding the business, estimating and scaling the benefits, and then applying the predicted value. Applying the predicted value to the immediate business allowed me to show how the WLP resources contributed to the business and opened numerous doors that were previously invisible to other WLP professionals. When all was said and done, how I applied or recommended that the value be applied was what really caught business executives' attention.

Immersion in the four-levels measurement approach

Early in my career, I struggled with how to apply the value achieved by my WLP efforts. I immersed myself in study of the four levels. I bought every book that Kirkpatrick wrote, even the ones that had nothing to do with measurement and evaluation. I attended classes taught by Kirkpatrick, Jack Phillips, Bob Brinkerhoff, and a host of other measurement and evaluation experts. I added to these classroom experiences deep reads into Judy Hale, Roger Kaufman, and Jim Kirkpatrick's books and articles.

These great authors helped me to bridge the gap between my WLP practice and what my program sponsors and executives were demanding. The predictive ROI techniques helped executives see what a WLP effort delivered, and created opportunities for me personally and professionally, outside of typical WLP venues. Even with the predictive ROI practice, I found myself caught between justifying WLP resources and programs versus applying the value created by this work.

Building bridges versus applying levels

During this time of trying to build better connections between WLP results and business executives' day-to-day and strategic concerns, an epiphany occured. Of course, this type of insight happened while I was engaged in what I thought was a totally unrelated activity. The event occurred while I was using spaghetti to build a bridge. You know—the activity of trying to get thin strands of spaghetti to support a heavy load and make sure that the bridge is not a "one-and-done" wonder.

The thought occurred that the four-level measurement process is a teacher-based linear approach and did not result in "reusable bridges" between WLP professionals, their participants, or executive sponsors. The design limitations of the four-level measurement approach became evident, and a new bridge-building paradigm (I hereby promise not to use that word again in this article, but it works in this instance) arose that helped me see what was possible with WLP measurement and evaluation. Focusing on building bridges showed several inherent limita-

tions to the logical chain built by Katzell and Kirkpatrick.

Approaches to bridge building

All in all, bridges account for the civil engineering principles of tension, compression, resonance, static equilibrium, stress-strain curves, and vibration. These principles help determine a bridge's capacity and capability. Designing a measurement and evaluation strategy based on a bridge building analogy and not just on an instruction-based logic chain may prove beneficial to furthering our measurement and evaluation capabilities.

I am not a civil engineer. However, think of a measurement and evaluation approach that factors in the tension evident in business, acknowledges the compression of time and resources that often accompany WLP requests or opportunities, and applies principles of resonance to avoid the one-and-done syndrome.

Add measurement and evaluation steps that provide static equilibrium to balance the WLP resource when not in use, throw in stress-strain curves (whatever those are) and the ability to handle the vibration of a team or organization's political machinations, and you are talking about a very intriguing difference to the standard-level WLP resource "inward looking" measurement system.

Purposes of bridges

In its simplest form, the purpose of a bridge is to allow quick and efficient reinforced and reusable access across a chasm. The chasm may be water, swamp lands, a valley, or even other roads and bridges. Viewed from this perspective, bridges improve the rate and ease of commerce, transportation, and communication.

The early history of settlements is much different after the construction of a bridge to "bridge" the residents of each community. The Brooklyn Bridge, the Golden Gate Bridge, and other lesser known bridges quite literally changed what people thought was possible and reduced the time required to accomplish the crossing of a chasm.

When WLP measurement and evaluation are thought of within the perspective of bridges, determining and applying the value generated by our WLP efforts becomes much more than "course-ometry" and rather touches the forms of organizational-ometry, society-ometry, and performance-improvement-ometry. These so-called ometries help shape our perspective and remind us that Geometry is simply "earth-measures." Think about the way that WLP bridges could improve the performance of your organization, and try building WLP bridges.

When WLP professionals build bridges across the organization and communication chasms, the required resources to navigate across the organization lessen. Consider the situation where all parts of the organization are accessible and communicating effectively through WLP bridges, compared with the organization in which an ever-increasing number of levels are being applied across an increasing number of WLP programs.

In one environment, you have a WLP professional capable of understanding current industry and organizational trends and issues, and who can apply appropriate WLP resources to resolve and drive various parts of the business. In the other environment, with a level-driven approach, WLP professionals face the never-ending task of applying measurement levels across their own programs.

This places the WLP professional in a less strategic position to drive change across the organization and improve individual and organizational performance. Both situations require similar WLP resources. The difference is how the WLP resources are applied. Strategically placed WLP resources can add value when called upon. WLP resources engaged in non-strategic, tactical level–based measurement processes do not enjoy this same value-adding characteristic.

Measurement and evaluation: there is a difference

Taking a step back from the bridge-building discussion and returning to

the WLP measurement and evaluation discussion allows an important concept to be addressed. When practicing WLP measurement and evaluation, the tendency is to blend the two terms "measure" and "evaluate" and use the words interchangeably. Confusing the two terms is simple because we often use the Katzell and Kirkpatrick measurement levels to evaluate. Blending the two terms reduces our WLP effectiveness and caused confusion regarding tactical and strategic direction.

Focusing only on measures places the WLP in a tactical position. Determining how to apply the performance improvement and value generated from WLP efforts places the WLP in a

Further Reading

Bingham, Tony, Jeary, Tony: *Presenting Learning*, Alexandria, VA, ASTD Press, 2007

Kirkpatrick Donald: "How to start an objective evaluation of your training program." *Journal of the American Society of Training Directors*, 1956

Kirkpatrick Donald: "Techniques for evaluating training programs." *Journal of the American Society for Training & Development*, 1959

Kirkpatrick Donald: "Techniques for evaluating training programs: Part 2—Learning." *Journal of the American Society for Training & Development*, 1959

Kirkpatrick Donald: "Techniques for evaluating training programs: Part 3—Behavior." *Journal of the American Society for Training & Development*, 1960

Kirkpatrick Donald: "Techniques for evaluating training programs: Part 4—Results." *Journal of the American Society for Training & Development*, 1960

strategic, value-laden evaluative position. Determining and applying the value created (or unlocked) by our WLP resources and effort moves the WLP professional from the customary wheelbarrow-pushing position behind the elephant parade, toward the sunlight and leading the discussion on how the newfound (or unlocked) value can be applied. Using the term "evaluation" to describe how value is applied raises the WLP professional to a more strategic, contributing position.

For clarification, remember the differences between the meanings of measure and evaluate. The term measure refers to discrete units or changes in performance. A related term, metric (think "ometry"), can be used to refer to informal nonrigorous measures that serve as proxy indicators. Evaluation can include the data generated from measures and metrics, but more critically refers to how the performance improvement, changes in measures, or other generated value can be applied.

When questions arise concerning how improved performance or previously unrecognized value can be applied, it is time for the WLP to realize that not only are they at the table, but they are "above the salt" and participating in strategic business decisions. The measurement of WLP improvements is good, the application of the value generated from your WLP efforts is better, and determining your next course (no pun intended) of action from the value generated from previous WLP efforts is best.

Katzell's contribution

In providing an extra incentive to read the end of this article, I inserted the name of Katzell in the introduction. Raymond Katzell represents an interesting find in my research to improve the way WLP programs are measured and evaluated. While Kirkpatrick's published works from 1959 and 1960 are referenced frequently, an interesting find was Kirkpatrick's 1956 article that attributed a four-step measurement process to Katzell.

Reviewing Katzell's four measurement steps helps WLP professionals view the inherent classroom and class-based nature of the four steps and the subsequent four-level measurement approach. Katzell-ometry addresses the requirements of classroom measurement well; however, it falls short in its design to understand organizations and drive performance improvement.

In *Presenting Learning*, Bingham and Jeary ask WLP professionals to speak the language of business and contribute to their organization's business results. Using the bridge metaphor when engaged in WLP measurement and evaluation will place your WLP resources in more advantageous and strategic positions. These strategic positions can be called on to deliver added value to the organizations and communities you serve. As the added value is achieved, measured, and applied, WLP professionals will continue our transition from running training programs to determining and applying the value created by our WLP resources. **T+D**

Stephen Smith is a performance improvement professional based in Lenexa, Kansas; Stephen_E_Smith@yahoo.com.

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