

# Organisational and Staff Development Services (OSDS)

## Evaluation Strategy

### 1. Introduction

OSDS delivers a wide range of professional development activities to cohorts spanning the full range of University staff community, including research staff, academic staff and support staff.

These activities support a range of themes within the University Strategy and represent a significant investment by the University. It is vital, therefore that OSDS has a robust and thorough approach to the evaluation of development activities. Such an approach will help to demonstrate that the investment in learning and development delivers development activities of a high standard, resulting in observable benefits to individuals, Schools/Service Units and the University as a whole, whilst also demonstrating value for money.

Our goals in creating and implementing an evaluation strategy are to:

- create a framework which will achieve an element of standardisation for evaluation processes, but within which evaluation methods can be adapted as appropriate to the activity being evaluated,
- provide a clear process flow and workable mechanisms for the collection and analysis of evaluation data, making thorough evaluation as straightforward as possible for practitioners and administrative staff.

### 2. Evaluation levels

Our intention, therefore is to evaluate all learning and development activities via data collection at each of the levels of the Kirkpatrick standard evaluation model<sup>1</sup>, adapted here to include 'baseline' assessment as 'Level 0'.

The levels at which development activities will be evaluated are as follows:

Level 0: Baseline

Level 1: Reactions

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<sup>1</sup> <https://www.kirkpatrickpartners.com/Our-Philosophy/The-Kirkpatrick-Model>

Level 2: Learning

Level 3: Behavioural Change

Level 4: Impact/ Return on Investment

### **3. Integration of evaluation into training planning and design**

It is important that evaluation within OSDS evolves to encompass all levels 0-4 and moves beyond the emphasis on Level 1 'reactions' which is well-embedded and widely adopted as the sole focus of training evaluation. It is also important that evaluation is seen as integral to the planning and design process and not a 'bolt-on' component which is considered only once the learning design, or even delivery has been completed.

The evaluation strategy will therefore require that for every learning and development activity, evaluation is considered from the early stages of planning of activities and is considered at each level in the Kirkpatrick model. Each activity will also be clearly linked to University strategy.

OSDS developers and the admin team will follow a documented process to achieve this. Systems and admin processes will be engineered to support this. For successful implementation there will also need to be a continuing cultural change in the way that learning and development is approached by staff and managers across the University.

Heads of School and Service Directors will be encouraged to discuss their team's learning and development needs during strategic planning meetings and will be supported in these discussions by OSDS.

It will be necessary to engage to a greater extent with learners, managers and Schools/Service Units in order to gather the baseline data and data at levels 2 through to 4. This will involve the creation and implementation of processes to, for example, capture qualitative and quantitative data on transfer of learning and behavioural change by following up participants periodically after the completion of development activities. It will also be necessary to initiate processes to gain alternative perspectives on learning transfer and behavioural change, such as the managers' perceptions of how learning and development activities have impacted on behaviour and performance.

### **4. Evaluation matrix – learning and development activities and evaluation methods**

In order to provide developers with a clear but adaptable menu of development options at each level for each type of development activity, the following evaluation matrix has been developed:

|                                       | <b>Level 0: Baseline</b>   | <b>Level 1: Reaction*</b>  | <b>Level 2: Learning*</b>  | <b>Level 3: Behaviour</b>  | <b>Level4: Impact/ROI</b>   |
|---------------------------------------|--|--|--|--|---|
| 1:1 sessions                          | Registration pro-forma:<br>Qualitative: what their objectives/issues are<br>Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence</b> | Participant feedback form  | Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence</b> | Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence. My contribution to the team has increased.</b><br>Qualitative: What are you doing differently?   | Igrad survey question<br>NSS survey question<br>Module evaluation data<br>Annual monitoring data<br>Staff survey/ CROS/<br>PIRLS<br>Helpdesk IT data. |
| Coaching                              | Setting out objectives<br>Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence.</b>  | Interview with coach after sessions complete   | Interview with coach after sessions complete   | Interview with coach after sessions complete<br>Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence. My contribution to the team has increased.</b><br>Qualitative: What are you doing differently? | Manager feedback  |
| Mentoring                             | Setting out objectives<br>Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence.</b>  | Participant feedback form  |  | Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence. My contribution to the team has increased.</b><br>Qualitative: What are you doing differently?<br>OSDS feedback case study.                    | Promotion rates<br>Collaborations<br>Funding<br>Staying in HE<br>Mentee group v control group (intern project every 2 years)                          |
| Stand-alone workshops/ Bespoke events | Setting out objectives<br>Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence.</b> (may not be necessary on ALL                     | Participant feedback form<br>Presenter feedback form (not always for bespoke events) | Participant feedback form<br>Tests/Quizzes of knowledge<br>Observed activities         | Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence. My contribution to the team has increased.</b>   | Manager feedback<br>Case studies  |

|                            | Level 0: Baseline   | Level 1: Reaction*   | Level 2: Learning*         | Level 3: Behaviour  | Level4: Impact/ROI  |
|----------------------------|---|--|----------------------------|---|---|
|                            | workshops).   |  |                            | Qualitative: What are you doing differently?<br>How well did you meet your objectives?  |   |
| Programmes                 | Setting out objectives<br>Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence</b> . Manager feedback |  |                            | Post-programme participant interview<br>OSDS feedback case study.<br>Qualitative: What are you doing differently?<br>How well did you meet your objectives? | Post-programme manager interview<br>Staff survey data<br>CROS/PIRLS data<br>OSDS feedback evaluation case studies (involving various different approaches dependant on the theme) |
| Awaydays/ team development | Setting out objectives  | Structure, material, venue, catering etc questionnaire for participants. | N/A                        | Delivery against objectives discussion with commissioning manager.<br>'Manager feedback<br>OSDS feedback case study.  | Manager interview<br>Staff survey data  |
| Conferences we organise    | Organiser objectives stated in advance<br>Identify long-term impact measures.   | Participant reaction forms   | Participant reaction forms | N/A   | Specific to conference topic e.g. increase in public engagement activities in funding bids; conference referred to in external discourse  |
| Online learning materials  | Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence</b> .<br>Identify long-term                      | Online participant feedback form   | Online quizzes             | Quantitative: 5 point self-assessment scale on <b>confidence</b> and <b>competence</b> .<br>Qualitative: What are   | Specific to topic e.g. Careers employability data   |

|                   | <b>Level 0: Baseline</b> | <b>Level 1: Reaction*</b>   | <b>Level 2: Learning*</b> | <b>Level 3: Behaviour</b>   | <b>Level4: Impact/ROI</b>  |
|-------------------|--------------------------|---|---------------------------|---|--|
|                   | impact measures.         |   |                           | you doing differently?<br>How well did you meet your objectives?                          |  |
| Networking events | Setting out objectives   | Participant reactions (e.g. post-it, paragraph)<br>Will you come to the next event? |                           | Are you still in contact with anyone you met at the event?<br>Number of repeat attendees. | Collaboration data<br>Participant case studies<br>OSDS feedback case study |

\*can happen simultaneously via same form

This matrix is intended as a guide for developers to help them create an evaluation plan for each development activity, whether a one-off event or a programme containing a range of individual activities.

## 5. Evaluation planning and processes for lead developers

For every development activity, lead developers will identify from the Evaluation Matrix, appropriate evaluation methods at each level. Where PDMS developments permit, these will be documented in the event information contained on PDMS.

An evaluation flow chart and step-by-step process map have also been produced in order to guide developers through the process.

## 6. Embedding evaluation and looking for impact

In order to continue developing cultural change and to engage Schools and Service Units in the process of evaluating the impact of learning and development, OSDS has will periodically produce detailed feedback case studies which will be published on the OSDFS webpages.

## 7. Updating and reviewing the strategy

This strategy will be reviewed periodically to ensure progress with evaluation processes. It is expected that the strategy itself will be subject to additions and amendments based on our experience.

30 May 2013

Updated April 2020