



Evaluation and Assessment: Time to get the dictionary out...

Mark Rendell, independent trainer and project manager, stirs the alphabet soup to describe and explain the differences between assessment, evaluation, monitoring and validation...

There's a lot of confusion around terms such as assessment, validation, evaluation, monitoring and auditing... the list goes on. So, I feel that I owe it to our sector to step up to the challenge of providing a lucid, robust and demonstrable summary of these terms and how we should be applying them to our L & D practice, particularly against the current challenging economic backdrop. What these terms really boil down to is how to measure success.

As **trainers**, we will want to know *how* and perhaps *why* our training intervention worked (or didn't) so that we can continue to improve by building on those elements that were successful and correcting those that weren't. In recessionary times, this data is even more valuable in that it helps to strengthen our 'pitch', our marketing efforts and where we should be devoting scarcer resources.

As **commissioners of training**, we will want to make sure that our trainees receive high quality training, that represents both value for money and achieves our learning aims. Good training is an essential tool for helping organisations undergo change, weather business turbulence and to safeguard the most important resource many of us have in our organisations, the people who make up the workforce.

As **trainees**, we will want to know if our efforts and application were worth it, that they achieved a successful outcome against the criteria, and where they did not, we want feedback on how and where to improve. We also want to close gaps in our skill sets, to continue to grow in our work, to make an effective contribution.

The challenge comes in the form of measuring accurately *and confidently* how much and in what ways the learning has contributed to our personal, professional and organisational goals. It is this challenge, I believe, that we need to address competently and collectively, to protect and bolster the reputation of training and L&D against this current and ongoing difficult economic climate.

So, let's take a look at the various measurement methods we have available and lock down the ways we should be deploying them. Dictionary at the ready!

If we are interested in finding out objectively *the extent to which learning has taken place*, we use **Assessments**. Usually in the forms of tasks and activities, they allow us to assign a grade or a mark out of a given total and/or within named levels, and according to a set procedure. Assessments can be carried out by an approved Assessor, who doesn't need to be the Trainer or the Learning Provider.

Assessments are usually straightforward, speedy and easily organisable methods for providing a comparative mark or percentage that the learner, the learning provider and the learner's organisation can use to measure their success against others or a sector benchmark.

Although it is possible to contest a grade, the marking procedures are inherently objective, transparent and robust. Assessments are also amazingly portable devices and can be deployed at any stage in the learning process and across wide swathes of the country, all at the same time and very economically. In some cases, assessments are used as 'doorways' to further learning – you can only pass through the door if you pass the previous Assessment.

In this scenario, Assessments provide strong foundations for progressive skill and knowledge acquisition. They can also be motivational – their objectivity means that they demand some authority and respect and also allow a learner to compare themselves against their peers or a particular benchmark.

But do you notice that Assessments are only really interested in the largely internal processes of the exchange of knowledge and skills between the learner and the trainer? What about the *external* impacts, back in the workplace, for example, of the learning intervention? For this, we are now going to need to flick right through the dictionary, almost to the end, as I want to introduce another term that gets confused regularly with Assessment.

The word is **Validation**. In the dictionary, the word Validation means: “*to confirm that it meets the needs of the user*”, and that “*the system or activity or outcome achieves its intended purpose.*” Hidden here is the need to talk about establishing *the value of something*. Let's draw this out a bit further.

Where *Assessment* can trade on its cool, impersonal objectivity, *Validation* demands a more individual, subjective and often customised input to establish the success of the learning as applied to the organisation, the role or the skills set of the learner. Put more simply, there is no universal way to validate an impact or outcome. It depends on local circumstances (what it was designed to address or change) and the design of the learning intervention itself.

But that doesn't sound helpful, does it? So, I'd propose that with Validation, there are two key questions we can pose to determine how to Validate the impact of the learning intervention:

1. (An internal measure) Have learners met the learning objectives?
2. (An external measure): Are your learners using what they learned in their jobs?

It follows then that for the learning encounter to be *validated*, you need to answer “Yes” to the first question. For the learning encounter to achieve its intended purpose in the work place, and therefore be validated there, you need to answer “Yes” to the second question.

So, grabbing hold of the *rope of logic* ever more tightly, you would need to design a Validation activity that simply allows you to answer definitively, “*Yes (it is valid)*” or “*No (it is not valid)*.” OK. So, Validation is a definitive act – the end of a process, if you like. The means we use to get to this particular end, to *validate something*, is called Evaluation.

Evaluation is about finding out the value (or worth) of the training. Its role is to enable you to confidently validate something (in our case, the training). Or to put it in more familiar terms, the role of evaluation is *to provide evidence that the learning outcome has achieved its purpose, so that it can be validated*.

So, in terms of linkages, we can see that all three terms I've been discussing here relate to each other. But, as we probably already know, evaluation is not necessarily a straightforward matter. We need to establish what needs to be evaluated (that will establish the validity of the learning). We need to know when to evaluate (so that we have the best chance of measuring the intended outcome), and we need to know how to evaluate so that we can gather the best evidence required in the most appropriate, and perhaps, economical, way.

We also need to ensure that we design in our evaluation activity *at the beginning* of the project or at the design stage of the learning intervention. As soon as we have carried out the training needs analysis and established our learning outcomes, we need to develop the most appropriate evaluation method that will help us to confidently validate the learning *later*.

You can see now that evaluation is the *vehicle* by which you can validate the learning. If you have planned an evaluation that, for example, will take some time after the learning intervention to complete, the impact of the training may not be detectable for several weeks or months. Then you may need to deploy an ongoing activity, usually called Monitoring.

Monitoring simply means *"to observe a system for evidence of change."* In our context, monitoring is a form of *process evaluation* that we can use when we want more detailed evidence of when and by how much an impact (or change) has occurred as a result of the training intervention. This type of information is extremely valuable, especially when the training impact is likely to be detectable through a change in behaviour, attitudes or practice.

Monitoring fits within the vehicle of Evaluation and, if you like, would be comparable to the way you drive this particular vehicle. If you are using a monitoring activity, then the chances are that you have decided to drive this particular vehicle quite carefully, slowly even, watching the road, the weather, the driving behaviour of other motorists etc.

So, there we are. Time to put the dictionary away for another time. Four terms we encounter regularly in our L & D work, but perhaps have harboured incomplete understanding of. I would urge you to look more closely at these terms and how you are deploying them in your own particular L&D context.

The success, or otherwise, of all these measurement activities is very dependent on the operating culture of your organisation. But, as we also contribute to the 'culture' of our organisations, perhaps we have a more powerful role than we imagine on influencing our organisations to value and see the worth of our assessment and evaluation activities.