Level 1 Evaluation at IRD

The views expressed in this presentation are those of Austen Sinclair, Senior Advisor, National Learning & Development. They have been prepared for the 2011 iMoot online conference. They do not necessarily represent the formal views of Inland Revenue and do not represent endorsement (or implied endorsement) of any commercial service or product.

Inland Revenue
Te Tari Taake

LearnIR

- Inland Revenue is New Zealand's Tax Department

- Around 5,500 staff across more than 20 sites

- Around a third of our people are involved in social policy administration (e.g. Student Loans, Child Support, Kiwisaver)

- We administer areas that experience frequent change, are generally complex, and the impacts of mistakes are significant to our customers

LearnIR

- We generally have three cycles of training for each change – spread over 2 to 3 years: initial briefing, transaction phase (payments), and follow up

- We do not have many external training providers for our core work

- We use bespoke online training products and in-person delivery by internal Subject Matter Experts (SME)

- Our internal SME's tend to be selected due to technical skill and availability

LearnIR

- We installed Moodle 1.6 as our LMS in August 2006

- It hosts course pages for all training (and most development activities) including those offered externally

- All face-to-face events are booked through the LMS

- 70% of all staff visit the LMS every month

  - They average 9 visits p/m

  - Spend between 30 to 50 minutes on the site p/m

- 1,500 live courses (additional 1,000 archived)

- We migrated some modules of the Totara fork in July 2010 to support recording Course Completion and its Reporting engine

- In March 2011 we migrated to Totara version 1.0

The following Level 1 Evaluation process was built in Moodle 1.9.7 - with varying degrees of effort it is portable to Moodle 2.0 and Totara

LearnIR

What do we evaluate?

Just training. However, it turns out that 'training' means different things to different people and views ranged from everything including Seminars & Conferences, to quite closed and excluding online material.

We agreed on…

Training, at IR, is defined as having:

1. an **objective** that the learner will be able to do as a result,

2. substantive and structured **content**, and

3. '**measured**' in that the learner gets feedback on their progress towards the objective.

How will we evaluate?

Turns out that by starting with draft evaluation questions initially seems to be making progress but quickly becomes an unsolvable equation. So, we stopped this.

We then agreed on the broad evaluation process…

LearnIR

The L1 evaluation process being:

- very short (max of 10 questions)

- learner responses are not anonymous

- automated, and not dependant on manual processing from trainers or course administrators

- data is open and visible to trainers, course owners & L&D folk

- compulsory (requires a return rate over 80% to be considered valid by the business)

- completed within 72 hours of training completion

- question/answer set is fixed for 12 months to enable comparison across courses & time frames

The L1 Questions:

Was really very difficult to get agreement on these. It took months and seven published versions before obtaining agreement.

It is a set of 15 questions (reducing to nine for e-learning courses) to run for the 2010/11 year. They appear at the end of this presentation.

LearnIR

Moodle Configuration:

The following is not a straightforward recipe and relies on custom modules and code. Nonetheless it is, in my view, worthwhile to follow as not all organisations would want or need all these steps.

Those using Moodle 2.0 will already have some of this functionality and those using Totara will have all this functionality.

Step 1: Tagging course pages as 'Training'

We used the existing Official Tags code adding it to the course page. To ensure they didn't get mixed up with interest tags used in personal profiles they where all styled "_LearnIR_type of course" where type of course ranged from:

- aspire (our core tax technical training),
- external,
- in-development,
- archived,
- Training, and
- Not_training.

One of the last two values is always applied. The other tags are used to provide additional analysis of data.

LearnIR

Step 1: Tagging course pages as 'Training'

Official Tags code in the Course Settings
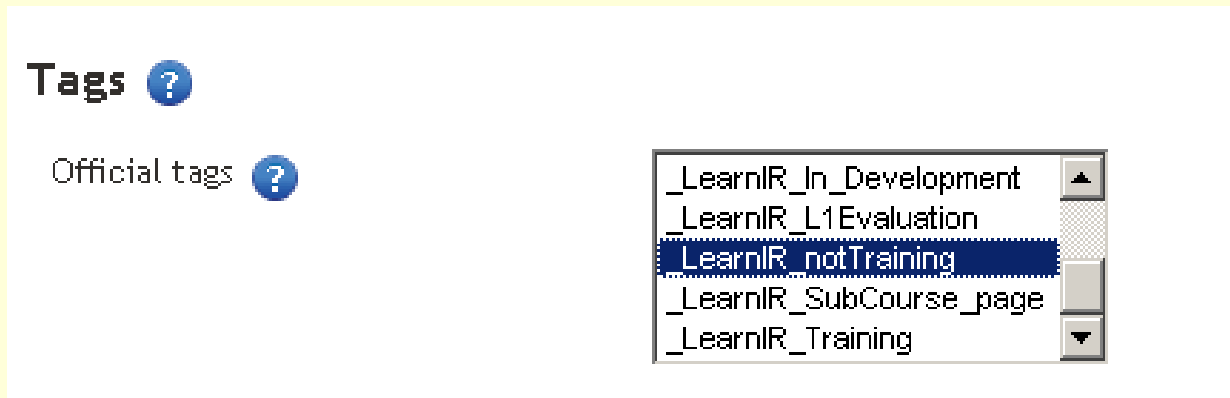
Step 2: Creating the Question templates in the Feedback Module

We used the Feedback module for this as it doesn't have the complexity of the Quiz module (and awkward 'scoring' issues) and has good reporting inside the course page.

We created two templates, classroom & online, for the question sets to ensure they are consistently applied.

Step 3: Tagging Feedback instances as 'L1 Evaluation'

Many non-training events sought to use the same Level 1 question & answer set for their own evaluation process and we had Official Tags added to the Feedback module so that we could find and report only on those tagged "_LearnIR_L1Evalution".

This is important later on!

Step 4: Changes to the Face-to-Face Module

We use the current version of this module which includes associating a Trainer to each individual session (see step 5) and marking attendance (see step 7 - trigger to send Nag emails)

We created a new system role, called **Trainer**, being a duplicate of the Staff member role (itself the standard Moodle 'Student' role) and added permissions to; Add & Remove attendees to a face-to-face session, and Take attendance.

Then we assign the role, at the course page level, to individuals who are available to deliver the training. Which allows them to associate themselves to F2F sessions as well as being assigned by course administrators.

LearnIR

Step 4: Changes to the Face-to-Face Module

Assigning a trainer in the Face-to-face session

Step 5: Creating a 'Trainer' look up label in the Feedback Module

We wanted to ensure that learners positively identified their trainer. This increases the focus on the trainer's performance and also helps learners self-moderate their comments. Critically, it is also one less manual intervention by the trainer/course admin as learners quickly advise if the wrong trainer is listed.

This involved creating a label used in the Feedback module that looks up from the corresponding F2F session to find the trainer and then displaying this trainers name and their Profile image.

Step 5: Creating a 'Trainer' look up label in the Feedback Module
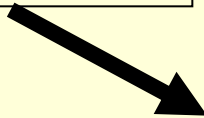
Step 6: Installing Activity & Course Completion

We are using the Moodle 2.0 Activity and Course completion code (back-ported to 1.9). This was required by us, independently of the L1 process, to add completion dates in staff member's Record of Learning.

For Level 1 evaluation the "Completed" Course Completion Status is the trigger to initiate the Level 1 process and also a measurement point to determine our return rate (remembering that 80%+ is considered necessary for the data to be considered credible).

LearnIR

Step 6: Installing Activity & Course Completion

Course Completion

Shown on every course page

Step 7: The Reminder engine

To improve the return rate we deployed the Reminder Engine, being a customisation at the course page level that checks a user's Completion Status. On detecting a Completion it then checks if the user has saved a completed Level 1 Evaluation for the course:

If not, then an email is sent inviting them to leave feedback and contains a direct link to the course page.

The next business day the user is checked again, if no feedback recorded then a second email is sent; this has a more strongly worded instruction to complete the L1 evaluation.

On the third business day if there is still no feedback, the staff member's manager is emailed to advise that the staff member's feedback is outstanding and that this is reported centrally reflecting on the level of performance in the business unit.

LearnIR
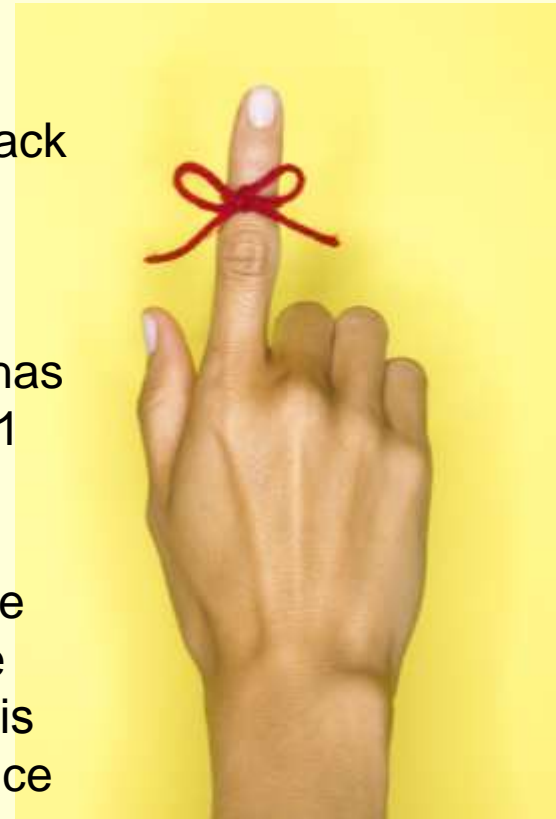
Step 7: The Reminder engine

Edit course reminders

Course Evaluation | **Add New**

Reminder

Title* ?   Course Evaluation

Completion to track* ?   Course completion

Requirement* ?   Course Evaluation

Invitation

Period ?   Same day

Subject ?   Please evaluate the [coursename] course in LearnIR

Message ?

Dear [firstname]

Congratulations on completing the [coursename] course.

There are two things we would like you to do now.

1. complete a course evaluation and
2. have a post course conversation with your manager

The course evaluation is important as it informs those responsible for training what is and what isn't working. The course evaluation is mostly multiple choice questions and takes 2 to 3 minutes to complete. The post course conversation follows on from the pre course conversation you had with your team leader/manager and covers the following points.

Reminder

Period ?   Next day

LearnIR

Step 7: The Reminder engine

Suffice to say this is a specularly unpopular process.

But, is also very effective and we have consistently exceeded an 80% return rate.

Step 8: Trainer Reports

A key purpose of the evaluation process is to ensure those delivering training have a structured & supported way of determining learner reaction and being able to improve after each session.

To produce the following we have deployed the new Reporting Engine (part of the Totara distribution) but it is probably possible to do this via Jasper reports or some other method of direct access your Moodle database.

On the front page of the LMS a report link is displayed to those who have the Trainer Role anywhere in the site (see step 4). This report displays the individual's results across all their courses in a graphic style similar to Feedback graphs.

LearnIR

Step 8: Trainer Reports

We wanted the L1 evaluation questions to be in a particular order and reportable regardless of being the short e-learning version or the longer classroom version.

We have a script that re-aligns the questions in reports so that we can have combined L1 data – a number of our courses were staff can be complete them by either attending a classroom sessions or online.

LearnIR

Step 8: Trainer Reports

Trainer view of their L1 feedback across all their sessions

Results from **153** completed feedback(s).

Q1: Which one of the following best applies to you?

153 response(s).

1	I chose this course myself		112 (73%)
2	This course was recommended to me		27 (18%)
3	This course was on my Development Plan		12 (8%)
4	I was told to do this course		2 (1%)

Q2: Did you have a conversation with your Team Leader/Manager about this course _before_ you attended it?

153 response(s).

1	Yes, and we talked about the content and how I'd apply it on my return to work		31 (20%)
2	Yes, and we talked about the content		31 (20%)
3	Yes, but only about approval to attend		57 (37%)
4	No		34 (22%)

Q3: How do you rate the quality of instructions, relating to the course, given to you _before_ attending?
Please consider factors such as pre-course work, instructions on how to find the training room, and requirements around what to bring.

153 response(s).

1	1, Excellent		90 (59%)
2	2, Sufficient		46 (30%)
3	3, Lacking in some areas (please tell us why below)		5 (3%)
4	4, Poor (please tell us why below)		12 (8%)

Q4: If you answered 3 (lacking) or 4 (poor) please tell us why

7 response(s).

There were no pre-course instructions

LearnIR

Step 8: Trainer Reports

Q10: The trainer was well prepared

153 response(s).

1	Strongly agree		126 (82%)
2	Agree		26 (17%)
3	Disagree		1 (1%)
4	Strongly disagree		0 (0%)

Q11: The trainer was engaging and responsive

153 response(s).

1	Strongly agree		133 (87%)
2	Agree		20 (13%)
3	Disagree		0 (0%)
4	Strongly disagree		0 (0%)

Q12: My learning was enhanced by the knowledge of the trainer

153 response(s).

1	Strongly agree		115 (75%)
2	Agree		31 (20%)
3	Disagree		1 (1%)
4	Strongly disagree		6 (4%)

Q13: Please provide feedback to the trainer on what they did well and/or could improve

82 response(s).

responded well to questions. Was prepared to say she did not know but would find the answer which was good.

LearnIR

Step 8: Trainer Reports

Trainer view of their upcoming (and past) training sessions.

Note 'Take Attendance' alert

Face to Face Name	Course Name	Course Category	Session Date ↑	Session Start Time	Session Duration	Session Room	Session Building	Session City	Session Capacity	Number of Attendees	Attendance Alert
Excel 201 - Getting Efficient	Excel 201 Getting Efficient	Excel	27 Apr 2011	12:30	4h 00m	PC Training Room, Wgn 12_28	Asteron Centre, 55 Featherston Street	Wellington	6	6	Take Attendance
PowerPoint 201 Getting Efficient	PowerPoint 201 Getting Efficient	Powerpoint	26 Apr 2011	13:00	3h 00m	PC Training Room, WGN 12_28	Asteron Centre, 55 Featherston Street	Wellington	10	4	

LearnIR

Step 9: New Trainers

We learnt after deploying this approach that we (L&D folk) have limited visibility of when staff are added as Trainers for the first time in the LMS to a course page. Yet, these new trainers are the most likely to benefit from understanding their Level 1 results – and least likely to have participated in our formal trainer development activities.

We have added an automatic enrolment in a Trainers course page for those assigned the Trainer role. They are also sent a welcoming email that describes the reporting on their performance, how they access it, and then how to use this in improving their training performance. We then shamelessly push updates to them via a Forced-subscribed forum every couple of months.

LearnIR

Step 9: New Trainers

Site Administration

- Notifications
- Users
  - Authentication
  - Accounts
  - Permissions
    - Define roles
    - Assign system roles
    - User policies
- Hierarchies
- Development Plan
- Courses
- Grades
- Location
- Language
- Plugins
- Security
- Appearance
- Front Page
- Server
- Networking
- Reports
- Miscellaneous

[Search]

Manage roles | Allow role assignments | Allow role overrides

Edit role ?

Name Trainer

Short name trainer

Description

Trebuchet | 1 (8 pt) | | Lang | **B** *I* U S ×₂ x² 🔲 ↺ ↻

≡ ≡ ≡ ≡ ¶ ¶ ⋮≡ ≔ ⋵ ⋵ Tₐ ⬥ — ⚓ ⧉ ⬚ ⬚ 🖼 ▢ ☺ 🎲 📄 ᵃᵇᶜ ⟨⟩ 📷

Duplicate of Staff member role

- Course (mod/facetoface) set 'allow' for all activities
- Face-to-face (mod/facetoface) set 'allow' for all activities

Path:

Legacy role type None

Send Welcome email ? ☑

Welcome email subject line Welcome to your new Trainer role in LearnIR

Welcome email message

Trebuchet | 1 (8 pt) | | Lang | **B** *I* U S ×₂ x² 🔲 ↺ ↻

≡ ≡ ≡ ≡ ¶ ¶ ⋮≡ ≔ ⋵ ⋵ Tₐ ⬥ — ⚓ ⧉ ⬚ ⬚ 🖼 ▢ ☺ 🎲 📄 ᵃᵇᶜ ⟨⟩ 📷

Hi

You have received this email as you have just been assigned the system role of Trainer within a course scheduled through LearnIR - congratulations.

Path:

Automatically Enrol in Course id ? 227

LearnIR

What we learnt

- It exposed differences on our understanding of what is 'Training' that needed to be resolved to advance this process.

- Everyone connected to L&D and training has a strong view on the questions asked in a business wide Level 1 Evaluation questionnaire. This in turn impacts how long it takes to settle on a single business wide agreed version.

- Powerful incentives (or consequences) are required to collect sufficiently high return rates of the L1 for it to be considered valid.

- We found in some courses the Completion occurs only after submitting a series of work samples generally many weeks after the structured training so in these cases we collected L1 immediately after the training in-person.

LearnIR

What we learnt

- This solution doesn't apportion L1 data between multiple trainers for sessions delivered by more than one trainer - for us this is a very rare occurrence.

- For external courses it can be difficult to determine if they met the Training definition. Given their cost we tend to favour calling them Training so that L1 data can be collected.

- We don't try to track individual trainers from external providers (who generally have their own paper based L1 in the session).

LearnIR

What our staff told us

- They really do not like being told to complete L1 and like it even less finding out their manager has been told they hadn't completed it. But, the return rate is now over 90%...

- Almost all of our Trainers rate between Good and Excellent. The very few bad trainers are now very visible!

- Almost all our courses are rated as relevant. The very few that rated low have either been removed or completely revised.

- We have some serious weaknesses in how courses are selected – in particular our Development Planning process bears little connection to development activities actually undertaken.

- We have some weaknesses in how staff are supported by their manager before & after attending training courses

LearnIR

Next steps

We want to show the L1 effectiveness rating by business group of the staff member viewing the Course Summary. This would be based on the Question: "Would you recommend this course to other staff who have the same role/job?". This approach is not without issues as many courses are mandatory and ratings can influence learner outcomes (even after changes are made that address a low rating).

Methods of collecting personalised data when there is more than one trainer involved in the delivery of the session. This is hard. On a technology front it's not clear how to apportion results and at a learner level it's hard to see how they can separate the relative performance of multiple trainers.

We are working on individual development plans that incorporate a team leaders measurement of changes in Competency after staff take development activities. This, along with our existing measures of course completion, should form a sufficiently robust data set for a level 2 evaluation process to be business credible. And, through the IDP process create a standard L3 methodology…

Our Level 1 Question set

1, Which one of the following best applies to you?

- – I chose this course myself
- – This course was recommended to me
- – This course was on my Development Plan
- – I was told to do this course

2, Did you have a conversation with your Team Leader/Manager about this course <u>before</u> you attended it?

- – Yes, and we talked about the content and how I'd apply it on my return to work
- – Yes, and we talked about the content
- – Yes, but only about approval to attend
- – No

3, How do you rate the quality of instructions, relating to the course, given to you <u>before</u> attending? [not asked for pure elearning courses]

Please consider factors as such as pre-course work, instructions on how to find the training room, and requirements around what to bring.

- – **1, Excellent**
- – **2, Sufficient**
- – **3, Lacking in some areas, please tell us why below**
- – **4, Poor, please tell us why below**

Our Level 1 Question set

4, If you answered 3 (lacking) or 4 (poor) please tell us why [not asked for pure elearning courses]

<free text field>

5, Did the course cover all of its objectives?

- strongly agree
- agree
- disagree
- strongly disagree

6, If, in the question above, you answered disagree or strongly disagree please tell us why

Our Level 1 Question set

7, Estimate your level of confidence in applying the new skills you learnt in this course?

- I feel confident that I can apply these immediately to my role
- I feel confident that I can apply these with minimal support
- I feel uncertain about applying this in my role without additional support
- I do not feel I can apply this to my role. Please tell us why in the box below.

8, If you answered that you do not feel you can apply this to your role, please tell us why

<free text field>

LearnIR

Our Level 1 Question set

9, The trainer was well prepared

- strongly agree
- agree
- disagree
- strongly disagree

10, The trainer was engaging and responsive

- strongly agree
- agree
- disagree
- strongly disagree

11, My learning was enhanced by the knowledge of the trainer

- strongly agree
- agree
- disagree
- strongly disagree

LearnIR

Our Level 1 Question set

12, Please provide feedback to the trainer on what they did well and/or could improve

    <Free text field>

13, What did you like about the course

    <Free text field>

14, What didn't you like about the course

    <Free text field>

15, Would you recommend this course to other staff who have the same role/job?

- **strongly agree**
- **agree**
- **disagree**
- **strongly disagree**

LearnIR