Chapter 10
Post–Course Survey Development: A Practical Approach with Valid and Reliable Results

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ABSTRACT
Evaluating workplace training often involves using participant surveys to gather information about effectiveness. Unfortunately, how well these surveys are designed will play a major role in the information quality used to make conclusions. Following a proper survey design method will improve data quality and help trainers better understand what these data truly mean. Additionally, as a first step in a chain of evidence, properly designed post-course surveys will play a key role in connecting training with any on-the-job changes. This chapter will describe in detail a survey design process adapted from Spector (1992) to yield key insights about training’s design, trainer and participants’ interactions during training, and participants’ perceived value of attending.

INTRODUCTION
Training employees is a critical part of any corporate organization. Keeping staff up to date on the latest information is necessary in order to operate effectively and not become obsolete. To determine trainings’ worth or value, trainers must evaluate the outcomes (Fitzpatrick, Sanders & Worthen, 2011) and collect evidence to show training was a proximate cause for change. Making a convincing case, however, that training was the cause for any change versus some other cause can be quite challenging. Most organizations do this by using surveys following training to gain insights into how effective the training was perceived by the participants (Caffarella, 2002; Morrison, Ross, Kalman & Kemp, 2011; Phillips & Stone, 2002), but this isn’t necessarily sufficient evidence to connect training with change. Unfortunately, many organizations do not conduct training evaluations beyond post-course surveys and
more problematic are the surveys themselves. Poorly designed surveys may provide some insights into what effect training may have, but in such situations, decisions made from poorly-designed surveys will be flawed (Kraut, 1996).

This chapter will provide trainers and training leaders with a practical survey-building approach, adapted from Spector (1992), which will yield valuable training insights. These insights will help demonstrate training effectiveness related to the training design, trainers’ interactions with the participants, and participants’ perceived outcome value. Additionally, specific elements of the organizational context known to impact training success and transfer of training will be identified, all of which help support claims of training’s impact on change.

**TRAINING EVALUATION**

Evaluating training programs can be simple or complex and range from gathering information on participants’ satisfaction to determining a precise financial return attributable to training efforts. Regardless, the primary purpose of any evaluation is “to render judgments about the value of whatever is being evaluated” (Fitzpatrick, Sanders & Worthen, 2011), which can take place at one or more of many levels. While many evaluation models exist, two models are foundational to the field: Kirkpatrick and Kirkpatrick’s “four levels” model and Phillips’ five-level ROI model.

Kirkpatrick and Kirkpatrick (2007) espouse a four-level evaluation hierarchy. The first level involves measuring customer satisfaction, or the reaction to the training. This involves determining how participants felt about the training and typically involves conducting surveys. The second level involves measuring how much participants learned as a result of attending the training. This level typically involves conducting tests of knowledge or skills to determine if participants know information or are able to do something taught in the training. The third level assesses changes in behaviors on the job following training. A measure of transfer of learning, this evaluation level helps to determine if training is a proximal cause, provided the opportunities to use the new knowledge or skill exist within the organization following training. Finally, the fourth level seeks to determine what, if any, business results are attributable to training. These results can take the form of business metrics or other indications of a “return on expectations” (Kirkpatrick & Kirkpatrick, 2007).

Phillips’ (1991) training evaluation model is very similar to Kirkpatrick and Kirkpatrick’s model. Level one measures participants’ reaction to the training, level two measures learning achievement in training, level three measures implementing lessons learned from training to the job, and level four measures changes on specific business impacts, such as various performance metrics. Where the two models differ is that Phillips differentiates a mere return on expectations with a return on investment in financial terms in a fifth level. This fifth level measures the monetary value of business results and costs for the program expressed as a percentage. Phillips’ approach to evaluation relies heavily on a “logical, systematic process that flows from one step to another” (p. 66) and requires planning early within the training development process to execute properly. While potentially more intricate than Kirkpatrick & Kirkpatrick’s approach, Phillips’ evaluation model effectively isolates training’s impact on the business through proper evaluation design, data collection, data analysis, and stakeholder involvement.

A key concept in training evaluation is connecting the training event to post-training effects at each evaluation level desired. When training is measured, starting with the first level (participant satisfaction) and includes each evaluation level up to the desired level, a chain of evidence is created. This chain of