



Setting Your Measurement and Evaluation Goals

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Each program, project, or procedure should be evaluated. Deciding to which levels to evaluate is an important decision. With hundreds of human capital programs in any given organization, from talent acquisition to conducting team member exit interviews, the challenge is to decide which ones are assessed at the higher levels. The Status of Measurement and Evaluation worksheet allows users to set goals for evaluating their human capital programs by completing the two vacant columns: “Current status (what percent of programs are evaluated at that level now)” and “Your Goal.”

Recommendations are provided, representing best practices within organizations. These are the minimum suggestions for best practices. The best practice is developed from three perspectives. The first perspective is what organizations have achieved as reflected in our benchmarking research. Our most recent research shows that users are evaluating levels three, four, and five at higher percentages than what is shown here. The second perspective to consider is that each level of evaluation can be developed for about 3 to 5% of the total budget for the function. Essentially, you spend roughly 4% of the budget to see how the other 96% is utilized. The third perspective is that top executives will generally accept this level of accountability, including limiting evaluations of human capital programs measured at the impact and ROI levels. Here are some tips on setting the goals.

- **Level 0 (Inputs)** measures are captured for every program. These include the number of people involved, the duration of the involvement, and associated costs. We suggest this should be 100%.
- **Level 1 (Reaction)** should be measurable for most programs. Enter the percent of programs measured now. Then, review the best practice and set your goal.
- **Level 2 (Learning)** includes formal and informal learning measures. What percent exists now? This amount could be estimated but should be close to accurate and supported by the team.
- **Level 3 (Application)** evaluation decreases significantly. This involves sampling in two ways: First, 30% of your programs are evaluated. Second, a smaller sample of the participants within some of the larger groups is usually evaluated.
- **Level 4 (Impact)** connects to business impact. Recognize that evaluating at this level includes the additional step of isolating program effects on the business measure.
- **Level 5 (ROI)** is the ultimate evaluation. Remember, about half of the programs that go to impact will be measured at Level 5.

For details that describe which program should be evaluated at each level, refer to **Project/Program Selection Criteria**.

Status of Measurement and Evaluation

All programs are not evaluated to every level. How does your use of the levels compare to the recommended use?

Level	Measurement Category	Current Status*	Recommended (Percent of programs evaluated at this level)	Your Goal*	Comments About Status
	Inputs Measures inputs into programs including number of programs, participants, audience, costs, and efficiencies		100%		This is being accomplished now
	Reaction Measure reaction to, and satisfaction with, the experience, ambiance, content, and value of the program		90-100%		Need more focus on content and perceived value
	Learning Measures what participants learned in the program — information, knowledge, skills, and contacts (takeaways from the program)		60-90%		Must use simple learning measures
	Application and Implementation Measure progress after the program — the use of information, knowledge, skills, and contacts		30-40%		Need more follow-up
	Impact Measures changes in business impact variables such as output, quality, time, and cost linked to the program		10-20%		This is the connection to business impact
	ROI Compares the monetary benefits of the business impact measures to the costs of the program		5-10%		The ultimate evaluation
	*Add your numbers in each box				

Specific Actions
