

Success Case Evaluation

Measuring the Organisational Impact of Training and Business Interventions

June 12 2007 - Dr Marguerite Foxon at The Learning Sanctuary

Do You Ask Yourself These Questions?

- How widely are people using what they learned in a training program or other intervention?
- Are there specific groups/levels that are or are not using it?
- In the case of deployment of a new initiative or product rollout, how can I assess effectiveness across the organisation, and identify where it was less or more successful, and why?
- How do I get evaluation data in measurable terms to demonstrate the impact of the intervention on the organisation without a statistics degree?
- Which factors made the program successful? Which worked against success?
- How can these factors be promoted or controlled in order to increase the impact going forward?



Success Case Evaluation will provide you with the answers to these questions in a timely and cost effective manner.

What is Success Case Evaluation?

Success Case evaluation is a research-based approach to evaluation of training and other interventions that allows you to make fast, practical assessments of organisational impact and business gains.

This method adds further value by uncovering systemic factors that contribute to success, as well as the reasons for neutral or negative outcomes from an intervention. This allows you to rapidly improve future deliveries of the same program and gain enhanced outcomes.

While Success Case evaluation is most often used in relation to training and leadership development, it is also a powerful tool for assessing the impact of HR or OD initiatives, sales or product roll-outs, and wider.

Dr Robert Brinkerhoff, an internationally recognized evaluation expert and the author of several books, developed success Case evaluation in 1988. Success Case has been used in dozens of organisations and has been documented in *The Success Case Method* (Berrett Koehler, 2002) and the follow-up book of cases *Telling Training's Story* (Berrett Koehler, 2006)

Success Case evaluation differs from ROI in several respects. It is not derived from statistical averages based on subjective estimates of improved performance or productivity. Rather, it is a robust and rigorous approach that provides concrete, measurable and incontrovertible evidence of organisational impact. Business leaders find such tangible data far more compelling and convincing than being given a metric such as "123% ROI"



How is a Success Case Evaluation Conducted?

- Success Case Evaluation unlike other evaluation approaches focuses on what is happening with the 'best' and 'worst' cases, rather than on the 'average' person.
- Using a very brief survey of the target population we identify the exceptionally successful cases.
- This sample is then interviewed in depth allowing us to (i) document the nature and money value of the impact from their actions, and (ii) identify and explain the environmental factors that have enabled them to be so impactful.
- Concurrently, those few cases that appear to be least successful are also interviewed.
- The findings and recommendations are immediately applied to the next iteration of the intervention to increase the impact.
- The documented in-depth stories of real impact can be shared across your organisation to provide evidence of return on investment in the intervention.

'I like the approach that Brinkerhoff has used You will be able to adapt his solutions to your own'
Donald L Kirkpatrick, PhD,
Author of *Evaluating Training Programs: The Four Levels.*

How Can I Bring Success Case Evaluation Into My Organisation?

- We offer a one-day Workshop with no minimum number of participants.
- The Workshop is practical and hands-on, built around current evaluation needs and projects if participants so desire.
- Participants receive exercises, practice, and input focused on conducting a Success Case evaluation.
- Topics covered include impact mapping, survey design, question formulation, population sampling, interviewing, data analysis, and report writing.
- By the end of the day, participants will be able to apply the tools and techniques to the evaluation of in-house interventions.

Dr Marguerite Foxon

Marguerite has worked with Dr Robert Brinkerhoff on Success Case evaluations in an international corporation, and has taught workshops around the world. She is a highly respected evaluation and performance improvement specialist who brings 25 years of experience in managing large-scale evaluation and global leadership development programs.

Previous roles included

- National Director of Education for Coopers & Lybrand
- Global Manager for Leadership Development and Evaluation in Motorola.
- Consulting in evaluation with Daimler Chrysler, Florida State University, and Florida Power & Light.

She is the author or co-author of three books and more than a dozen articles on evaluation and is a Director with the **International Board of Standards for Training, Performance and Instruction**

'The Success Case method is simple and practical while yielding compelling and reliable information on training results'
Dana Gaines Robinson
Co-author of *Performance Consulting: Moving Beyond Training.*

What is the cost?

£275 per attendee plus vat not including any accommodation you may require

Discounts will apply to 2 or more attendees from the same organisation

We have negotiated a special rate for accommodation with De Vere Collection of £80 bed and breakfast

Where is the event?

The event will be held at the Mill and Old Swan Training Centre, Minster Lovell, near Oxford

Who Do I Contact?

E-mail info@thelearningsanctuary.co.uk to book your place on this exciting and enlightening event

To discuss further please telephone The Learning Sanctuary on 0845 833 1178