



# 2004 Measurement Kit<sup>TM</sup>

Tools for Benchmarking and  
Continuous Improvement

## PART II: Training Outcomes

Part II-A: Initial

Part II-B: Follow-up

Submit your data ONLINE!!

[www.astd.org](http://www.astd.org)

All participating organizations will receive a **FREE** customized Part I Benchmarking Report. **PLUS**, get a **FREE PDF** version of the ASTD Learning Outcomes Report when you submit your data by **May 31, 2004**.



### **The ASTD Benchmarking Service**

The Benchmarking Service is designed to build an extensive database of comparative information about training expenditures from a large number of organizations—large, small, public, and private. The data collection instrument—the *ASTD Measurement Kit*<sup>™</sup>—represents the first set of standardized measures that provide common ground for the comparison of results. This venture will help firms monitor and improve the effectiveness of training and provide credible data for industry-wide comparisons.

**Participating firms will each receive a free customized Benchmarking Report comparing their training investments and outcomes with those of similar organizations.**

Overall, the Service and *Kit* provide new, widely accepted measures of training for the industry as a whole, and create new information on what works in training and what doesn't. This will help to establish new accountability within the training industry and enhance the credibility of the professionals who work within it. The *Kit* consists of two parts.

**Part I: Training Investments.** This part is designed to use standard questions to measure your organization's training and human resource practices and investments. It contains a set of required core questions on training investments, as well as a series of optional content-based question modules on training and related practices.

**Part II: Training Outcomes. (Optional.)** This part is designed to collect standard information on your training outcomes. It provides two sets of standard questions that can be administered to recipients of training interventions (and their supervisors). By comparing aggregate answers for each question to those of other organizations offering similar courses, organizations have access for the first time to benchmarks of training outcomes and diagnostic feedback.

**Please read all instructions thoroughly before beginning this project.**

**Data Submission Deadlines For Free ASTD Learning Outcomes Report:**

**September 1, 2004**

**Please submit your data online at [www.astd.org](http://www.astd.org).**

Alternatively, Summary Data Forms completed before **September 1, 2004**, may be sent to:  
ASTD Benchmarking Service  
1640 King Street, Box 1443  
Alexandria, VA 22313-2043

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## **TIMELINE FOR SUBMITTING PART II DATA**

### **Before September 1, 2004:**

Organization must submit Part II data by September 1, 2004 to receive *free* Part II Benchmarking Report. Non US participants without Internet capabilities must submit completed Part II questionnaires postmarked no later than September 1, 2004:

? **Submit your data electronically via the World Wide Web** through ASTD's secure *Electronic Measurement Kit (E-Kit)* at [www.astd.org](http://www.astd.org).

- ? The E-Kit provides complete instructions that allows you to easily and securely submit your organization's data
- ? Save and Resume allows you to enter data at your own pace
- ? Data Checking is instantaneous
- ? Corrections can be easily made
- ? And Benchmarking Reports can be provided within 24 hours of submission

? **Non US Participants who are unable to submit data electronically may** submit it to ASTD at the address below, making sure it is postmarked no later than September 1, 2004. To return the form to ASTD, simply close the booklet by affixing tape in the indicated areas and attach appropriate postage. **ALL US PARTICIPANTS MUST SUBMIT DATA ELECTRONICALLY.**

### **ALL SUBMISSIONS AFTER SEPTEMBER 1, 2004**

Organizations that wish to submit Part II data after September 1, 2004, **must submit their data electronically** via the *Electronic Measurement Kit (E-Kit)* at [www.astd.org](http://www.astd.org). We will *not* be able to accept *paper* data forms after September 1 for the free Benchmarking Part II Report.

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### **HOW TO COMPLETE THESE FORMS**

- (1) Administer the two sets of core evaluation questions (initial and follow-up) at the appropriate times to training participants and their supervisors. These questions may be used to evaluate as many different courses as you wish. The "benchmarkable" core questions may be supplemented by other questions for your own internal use.
- (2) Tally the responses, broken down by the course type categories provided in this booklet (multiple courses in the same course category should all be included on the same data sheet).
- (3) Fill out the data sheets with the responses. One sheet should be submitted for each combination of (a) Part II-A/Part II-B, (b) Course Type, (c) Provider Type (internal/external), and (d) for Part II-B only, Respondent Type.

More complete instructions can be found later in this booklet.

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### **YOUR CUSTOMIZED BENCHMARKING REPORTS**

Your organization's customized Part II Benchmarking Report(s) will be sent to you as soon as possible following the completion of the 2004 Benchmarking Outcomes Database. We anticipate this will be in November 2004 for organizations submitting paper questionnaires, and will be earlier for organizations submitting data online.

Participants will receive a separate Benchmarking Report for each data sheet that they submit (although multiple data sheets for the same course type will be aggregated into one). This report will compare the organization's average evaluation responses for each question to (1) averages among respondents in all organizations which provided data for that course type, and (2) overall averages among respondents for all

course types. If a sufficient number of organizations respond, outcomes will also be compared to a third comparison group—organizations in the same industry.

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**GUARANTEE OF CONFIDENTIALITY**

We recognize that some of the requested information might be proprietary. This information is necessary to generate useful and reliable comparisons. ASTD (and, if applicable, your *Measurement Kit* distributor) guarantees that all information you provide will be kept strictly confidential and anonymous and that we will never release any information that would allow any company or person to be identified.

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**ASTD BENCHMARKING SERVICE IN FUTURE YEARS**

ASTD expects to offer this Benchmarking Service throughout the coming years. Thus, if you are unable to complete an evaluation in time to submit evaluation data in the 2004 data cycle, you should save the data and submit it the following year.

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## **CONTACT INFORMATION**

If you have any questions as you go through the questionnaire, please contact ASTD by email at [benchservice@astd.org](mailto:benchservice@astd.org), or by telephone at 703.838.5841.

If you need another free copy of the Measurement Kit, please request a free email attachment of the Kit by emailing [benchservice@astd.org](mailto:benchservice@astd.org). Alternatively, you can call ASTD Customer Service at 703.683.8100 and request Item #BSURVEY, or you can visit ASTD's website at [www.astd.org](http://www.astd.org) and fill out an interactive electronic version of the Measurement Kit.

Only if you do not submit your data online, please return your completed paper Summary Data Forms to: ASTD Benchmarking Service, 1640 King Street, Box 1443, Alexandria, VA 22313-2043.

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## » INTRODUCTION

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Part II of the ASTD Measurement Kit will allow you to conduct Initial (Part II-A) and Follow-Up (Part II-B) evaluations of your organization's training, learning, and performance interventions. By conducting these evaluations using the standard questions contained in this booklet and submitting the data to ASTD, your training outcomes can be benchmarked against those of other organizations. Inside you will find guidelines, core evaluation questions, and directions for reporting data back to ASTD.

Please note that Part II is designed for job-related courses and interventions, not personal development courses.

The performance evaluation surveys and benchmarking services contained in Part II:

- ? produce information for internal continuous improvement
- ? facilitate cross-organizational learning by producing comparable outcome data across firms
- ? allow companies to tailor the surveys to meet specific internal needs
- ? identify some of the key barriers and enablers of the transfer of learning to the job
- ? are appropriate for classroom-based, as well as electronic, delivery strategies

## **Performance Evaluation Framework**

Kirkpatrick's four-level model continues to be the most prevalent framework for evaluation. The ASTD outcome evaluation instruments were designed along the lines of this model. The relationship between the tools presented in this booklet and the Kirkpatrick model is as follows:

- Part II-A (Initial)            Includes elements of Kirkpatrick Levels 1 and 2  
Part II-B (Follow-Up)       Includes elements of Kirkpatrick Levels 1, 2, and 3

## **Core Evaluation Questions**

ASTD—in conjunction with corporate members of the ASTD Benchmarking Forum—designed this set of core evaluation questions to facilitate comparative analysis and benchmarking of training outcomes across organizations. In order for these core evaluation questions to be comparable across varied organizations, they are necessarily general and summative, rather than detailed. We expect that most participating organizations will choose to complement these “benchmarkable” core evaluation questions with additional questions related to organization-specific processes and practices.

## **GENERAL INSTRUCTIONS**

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This booklet contains two sets of subjective core evaluation questions on which you will be able to obtain benchmarking data. After administering the evaluations, please submit the data sheet(s) to the ASTD Benchmarking Service in accordance with the instructions that follow. If you wish to receive your Part II Benchmarking Report(s) free of charge, they must be submitted before the September 1, 2004, deadline. In order for this benchmarking effort to be successful and as useful as possible, you must follow these guidelines as closely as possible.

### **Survey Wording**

ASTD cannot provide accurate benchmarking data on training outcomes unless all participants use the exact same wording for the questions. For this reason, the wording of the core evaluation questions should *not* be altered in any way, with two exceptions: (1) the terms “course” and “intervention” may be replaced with the appropriate term for your organization (e.g., workshop, seminar, meeting, etc.); and (2) the term “instructor” may be replaced with an appropriate term (e.g., subject matter expert, leader, etc.).

### **Survey Format**

Many organizations already have some method (formal or informal) of evaluating their training, learning, and performance interventions. The questions and scales included in this booklet should be integrated into your organization's format and current evaluation forms. Since the item numbers will not remain the same if you integrate the core questions with additional questions, it is important that you keep track of the individual benchmarking items because you will need to report the results to ASTD by item number.

### **Supplementing the Surveys**

ASTD strongly recommends that you include additional questions in your evaluation surveys that allow your organization to gather other (non-benchmarkable) information for your own internal purposes. A free “Question Bank” at the ASTD website ([www.astd.org](http://www.astd.org)) provides additional items for evaluating course/intervention participants.

## **Reporting the Data**

On the Summary Data Form for each Part, you should provide the frequency distribution (the number of responses in each category—for example, 10 people strongly disagreed, 5 people disagreed, 24 people agreed, etc.) for each of the core evaluation items.

You should submit a separate data sheet for each combination of (a) Part II-A/Part II-B, (b) Course Type, (c) Provider Type (internal/external), and (d) for Part II-B only, Respondent Type. Thus, many organizations will be submitting multiple forms. For this reason, photocopies of the blank data forms should be made. For example, submit one form to summarize participants' responses to 10 customer service courses provided by an external supplier, and another form for participants' responses to 25 professional skills courses provided internally.

More specific instructions on filling out the Summary Data Forms can be found in the section entitled "How to Complete the Summary Data Forms" on page six.

When you submit the Summary Data Forms to ASTD, please also provide an exact (blank) copy of the evaluation instruments used by your organization to gather the data included on the forms.

## **PART II-A (INITIAL)**

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### **Content**

The initial core evaluation questions are intended to measure the participant's immediate reaction to the intervention/course. The questions collect data in five categories:

- ? Administrative/Logistics
- ? Content
- ? Design
- ? Instructor
- ? Perceived Impact

### **Timing: When to Administer the Initial Evaluations**

It is recommended that these evaluation questions be administered to all participants in a course/intervention *immediately* following the completion of the intervention.

## **PART II-B (FOLLOW-UP)**

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### **Content**

The follow-up core evaluation questions are intended to measure the participant's assessment of the impact of an intervention/course some time later. The questions collect data in four categories:

- ? Use of Skills
- ? Confidence in Ability to Perform
- ? Barriers and Enablers of Transfer
- ? Impact measures

### **Survey Format**

It is important to include the course/intervention objectives at the top of the survey form so that respondents can refer to them as they complete the questions.

### **Two Different Sets of Follow-Up Questions**

Two different sets of questions are provided for Part II-B. The first set are designed to be administered to all participants in a course/intervention. The second set (which correspond to the first, but have some necessary differences in wording) are designed to administered to the supervisors of the participants in the course/intervention. Data from the two sets of questions should be tallied separately and submitted on separate Summary Data Forms (one for participants, the other for supervisors).

### **Timing: When to Administer the Follow-Up Evaluations**

It is important to conduct the follow-up evaluations an appropriate length of time after the course or intervention. The recommended times between the completion of the course/intervention and the administration of the instrument to employees and their supervisors are as follows:

- ? For training in skill areas for which there would likely be immediate and/or obvious changes in performance, or for skills which are used regularly and frequently (for example, sales training or information technology applications), a period of 3-6 months between the intervention and the survey may be sufficient.
- ? For training in skill areas which are used infrequently or for which changes in performance are demonstrated over a longer period of time (for example, executive development or managerial/supervisory skills), a more extended period of 6-12 months following the course/intervention may be appropriate before administering the follow-up survey.

### **Increasing Response Rate**

To increase the response rate and to reduce the response bias expected from such a data collection effort, we recommend that employees and their supervisors receive at least one reminder to complete the follow-up evaluation (for example, a postcard, e-mail, telephone call). A designated person within your organization should own responsibility for conducting this follow-up evaluation.

### **Reporting Impact Measures**

The format of questions 9 and 10 in Part II-B is different from the format of the other questions in Parts II-A and II-B. Respondents are asked to provide numerical estimates of the impact of the course/intervention. On the Summary Data Sheet, provide the minimum individual response, the maximum individual response, and the mean (average) of all responses, as well as the number of non-respondents.

## COMPLETING THE SUMMARY DATA FORMS

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As mentioned above, *it is very important* that you submit a separate Summary Data Form for each combination of (a) Part II-A/Part II-B, (b) Course Type, (c) Provider Type (internal/external), and (d) for Part II-B only, Respondent Type. As a result, it is likely that many organizations will submit multiple data forms.

Parts II-A and II-B have different Summary Data Forms. Please make sure that you are using the appropriate form for your data.

In completing each form, please follow the specific instructions below:

### **Section 1: ORGANIZATIONAL INFORMATION**

Organization (Reporting Unit)—Please indicate the name of the organization for which you are providing course information in Part II. *This unit should be the same unit that you used in Part I (Training Investments)*, as indicated in Part I, question #3. Please also provide Contact Name, Address, Telephone Number, and Fax Number.

Note: If you submit multiple Summary Data Forms *simultaneously and in the same envelope*, you only need to complete the *full* organizational information on one form. Please enter organization name on all forms, however.

### **Section 2: COURSE TYPE**

Please check the one box corresponding to the course type for which data are being provided on the Summary Data Form being completed. Definitions of each course type can be found in the Definitions section in the back of this booklet.

### **Section 3: PROVIDER TYPE**

Please check the one box corresponding to the primary source of the courses included on the Summary Data Form being completed. “Internal” should be checked if, in your estimation, the courses are primarily provided by a unit inside of your overall organization. “External” should be checked if the primary source is an outside training supplier, consultant, or other external organization. If “external” is selected, please also provide the exact name of the specific provider. A “provider” may be the organization that actually administers the training, or it may create or design training content purchased by your organization.

### **Section 3.5 (Part II-B only): RESPONDENT TYPE**

Please check only one box to indicate whether the Part II-B data being included on the form were provided by participants in the training intervention or by their supervisors. If you have data from both participants and supervisors for a course type/provider combination, two different Summary Data Forms should be submitted—one each for participants and supervisors.

### **Section 4: ADDITIONAL COURSE INFORMATION**

First, please indicate whether the courses included in the data are intended primarily to maintain an individual’s or team’s existing capability/competency or to build a new capability/competency for an individual or team. A capability is defined as the knowledge, skill, or ability to perform a key job function.

Next, please indicate whether the majority of course participants have fewer than 12 years of formal education.

Finally, please indicate whether participation in this course type was voluntary or mandatory for the majority of participants.

### **Section 5: EVALUATION DATA**

First, please fill in the appropriate spaces with:

- ? the number of courses included in the data
- ? the number of individuals who responded to the evaluation survey
- ? the number of individuals who did *not* respond to the evaluation survey

(The sum of “# of individuals responding” and “# of individuals not responding” should equal the total number of individuals who received copies of the evaluation surveys.)

Next, for each question, please provide:

- ? the count for each response category (i.e., the number who responded “strongly disagree” for question 1, the number who responded “disagree” for question 1, etc.)
- ? the number of individuals who did not answer that specific question (but *did* respond to the survey)

(The sum of respondents and non-respondents for each item should equal “# individuals responding.”)

In Part II-B only, for questions 9 and 10, enter the minimum value reported by any respondent, the maximum value by any respondent, and the mean (average) value of all respondents.

### **Section 6: DELIVERY METHOD**

Please select the *one* delivery method category that represents the primary means of delivering the courses for which you are providing data. Proceed to Sections 7 and 8 only if you select “Learning Technologies” in this section.

*Learning technologies* are defined as the use of electronic technologies to deliver information and facilitate the development of skills and knowledge.

### **Section 7: PRESENTATION METHOD**

If you checked “Learning Technologies” in Section 6, please check the *one* presentation method used most frequently for the course for which you are providing data (the courses included on your Summary Data Form may use many different presentation methods, but only the one used most frequently should be checked in this section). Definitions of each presentation method may be found in the Definitions section.

### **Section 8: DISTRIBUTION METHOD**

If you checked “Learning Technologies” in Section 6, please check the *one* distribution method used most frequently for the course for which you are providing data (the courses included on your Summary Data Form may use many different distribution methods, but only the one used most frequently should be checked in this section). Definitions of each distribution method are in the Definitions section.

**PART II-A: INITIAL EVALUATION:  
CORE QUESTIONS (Participants Only)**

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**Scale for Initial Core Evaluation Questions**

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Strongly Disagree	Disagree	Neither	Agree	Strongly Agree
1	2	3	4	5

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**Administrative/Logistics**

1. I had the knowledge and/or skills required to start this course.
2. The facilities and equipment were favorable to learning.

**Content**

3. I was able to take this course when I needed it.
4. I clearly understood the course objectives.
5. The course met all of its stated objectives.

**Design**

6. The way this course was delivered (such as classroom, computer, video) was an effective way for me to learn this subject matter.
7. Participant materials (handouts, workbooks, etc.) were useful during the course.
8. I had enough time to learn the subject matter covered in the course.
9. The course content was logically organized.

**Instructor**

10. Overall, I was satisfied with the instructor(s).

**Perceived Impact**

11. My knowledge and/or skills increased as a result of this course.
12. The knowledge and/or skills gained through this course are directly applicable to my job.
13. Overall, I was satisfied with this course.

**PART II-A: INITIAL EVALUATION SUMMARY DATA FORM**

**Please submit online at [www.astd.org](http://www.astd.org) or photocopy this blank form and submit a separate form to ASTD for each combination of (a) Course Type, (b) Provider Type (Internal/External), and (c) Respondent Type (Participant/Supervisor).**

**SECTION 1: ORGANIZATIONAL INFORMATION**  
Organization (Reporting Unit)

\_\_\_\_\_

Contact Name \_\_\_\_\_

\_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Address \_\_\_\_\_ E-mail \_\_\_\_\_

\_\_\_\_\_

Telephone number \_\_\_\_\_ Fax number \_\_\_\_\_

\_\_\_\_\_

Please select the industry classification from the Appendix in the back of this booklet that best describes your organization's primary line of business. Please fill in the three-digit code: \_\_\_\_ \_\_\_\_ \_\_\_\_

Has your organization previously participated in the Measurement Kit/Benchmarking Service (either Part I or Part II)?  
Yes No  
If so, please enter your ID if you know it (the ID can be found at the top of any customized report)  
\_\_\_\_\_

**SECTION 2: TRAINING COURSE TYPE (check only one)**

- Customer relations orientation
- Quality, competition, and business practices
- Occupational safety/compliance
- New employee
- Sales and dealer processes and product knowledge
- Executive development
- Information technology skills
- Technical procedures
- Managerial/supervisory skills
- Interpersonal communication
- Basic skills
- Professional skills

**SECTION 3: PROVIDER TYPE (check only one)**

- Internal (primary provider for this course type is inside your organization)
- External (primary provider is outside your organization—training vendor, consultant, etc.)  
Please provide specific name of your outside provider for this course type \_\_\_\_\_

**SECTION 4: ADDITIONAL COURSE INFORMATION**

These courses are intended to:  maintain an individual's/team's existing capability  build a new individual/team capability

Do the majority of employees in these courses have fewer than 12 years of formal education?  Yes  No

Is participation voluntary or mandatory for the majority of employees in this course type?  Voluntary  Mandatory

**SECTION 5: EVALUATION DATA**

# of courses included in data: \_\_\_\_\_ # individuals responding: \_\_\_\_\_ # individuals not responding: \_\_\_\_\_

	Strongly Disagree (count)	Disagree (count)	Neither (count)	Agree (count)	Strongly Agree (count)	Non Respondents ((count)
1						
2						
3						
4						
5						
6						
7						
8						

9						
10						
11						
12						
13						

**SECTION 6: DELIVERY METHOD (check only one)**

- Classroom (Instructor-led or Advanced Technology) (if checked, skip final two sections)
- Learning Technologies (if checked, continue to Sections 7 & 8)
- Other Self-paced Instruction (if checked, skip final two sections)

**SECTION 7: PRESENTATION METHOD (check only one)**

- CBT (text only)                       Interactive TV                       Groupware                       Electronic Performance Support
- Multimedia                       Teleconferencing                       Virtual reality                      System (EPSS)

**SECTION 8: DISTRIBUTION METHOD (check only one)**

- Cable TV                       Extranet                       Local Area Network (LAN)                       Voicemail
- CD-ROM                       Inernet                       Satellite TV                       Wide Area Network (WAN)
- Electronic Mail (email)  Intranet                       Simulator                       World Wide Web

**PART II-B: FOLLOW-UP EVALUATION:  
CORE QUESTIONS (PARTICIPANT)**

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**Scale for Core Evaluation Questions 1-8**

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Not at all or never/rarely	To a small extent	To a moderate extent	To a great extent	To a very great extent	Not applicable
1	2	3	4	5	NA

---

**Use of Skills**

1. To what extent did you use the knowledge and/or skills prior to attending this course?
2. To what extent have you had the opportunity to use the knowledge and/or skills presented in this course.
3. To what extent have you actually used the knowledge and/or skills presented in this course, after completing the course?

**Confidence in Ability to Perform**

4. To what extent has your confidence in using the knowledge and/or skills increased as a result of this course?

**Barriers and Enablers of Transfer**

5. To what extent did you receive the assistance necessary in preparing you for this course?
6. To what extent has the content of this course accurately reflected what happens on the job?
7. To what extent have you had access to the necessary resources (e.g. equipment and information) to apply the knowledge and/or skills on your job?
8. To what extent have you received help, through coaching and/or feedback, with applying the knowledge and/or skills on the job?

**Impact Measures**

9. As a result of this course, my performance on the course objectives has changed by \_\_\_\_\_%. (please indicate +/-)
10. As a result of this course, my overall job performance has changed by \_\_\_\_\_%. (please indicate +/-)

**PART II-B: FOLLOW-UP EVALUATION:  
CORE QUESTIONS (SUPERVISOR)**

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**Scale for Core Evaluation Questions 1-8**

---

Not at all or never/rarely	To a small extent	To a moderate extent	To a great extent	To a very great extent	Not applicable
1	2	3	4	5	NA

---

**Use of Skills**

1. To what extent did s/he use the knowledge and/or skills prior to attending this course?
2. To what extent has s/he had the opportunity to use the knowledge and/or skills presented in this course.
3. To what extent has s/he actually used the knowledge and/or skills presented in this course, since completing the course?

**Confidence in Ability to Perform**

4. To what extent has her/his confidence in using the knowledge and/or skills increased as a result of this course?

**Barriers and Enablers of Transfer**

5. To what extent did s/he receive the assistance necessary in preparing for this course?
6. To what extent has the content of this course accurately reflected what happens on the job?
7. To what extent has s/he had access to the necessary resources (e.g. equipment and information) to apply the knowledge and/or skills on the job?
8. To what extent has s/he received help, through coaching and/or feedback, with applying the knowledge and/or skills on the job?

**Impact Measures**

9. As a result of this course, her/his performance on the course objectives has changed by \_\_\_\_\_%. (please indicate +/-)
10. As a result of this course, her/his overall job performance has changed by \_\_\_\_\_%. (please indicate +/-)

**PART II-B: FOLLOW-UP EVALUATION SUMMARY DATA FORM**

**Please submit online at [www.astd.org](http://www.astd.org) or photocopy this blank form and submit a separate form to ASTD for each combination of (a) Course Type, (b) Provider Type (Internal/External), and (c) Respondent Type (Participant/Supervisor).**

**SECTION 1: ORGANIZATIONAL INFORMATION**  
Organization (Reporting Unit)

Contact Name \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_ E-mail \_\_\_\_\_

Telephone number \_\_\_\_\_ Fax number \_\_\_\_\_

Please select the industry classification from the Appendix in the back of this booklet that best describes your organization's primary line of business. Please fill in the three-digit code: \_\_\_\_ \_\_\_\_ \_\_\_\_

Has your organization previously participated in the Measurement Kit/Benchmarking Service (either Part I or Part II)?  
Yes No  
If so, please enter your ID if you know it (the ID can be found at the top of any customized report)

**SECTION 2: TRAINING COURSE TYPE (check only one)**

- Customer relations orientation
- Quality, competition, and business practices
- Occupational safety/ compliance
- New employee
- Sales and dealer processes and product knowledge
- Executive development
- Information technology skills
- Technical procedures
- Managerial/supervisory skills
- Interpersonal communication
- Basic skills
- Professional skills

**SECTION 3: PROVIDER TYPE (check only one)**

- Internal (primary provider for this course type is inside your organization)
  - External (primary provider is outside your organization—training vendor, consultant, etc.)
- Please provide specific name of your outside provider for this course type \_\_\_\_\_

**SECTION 3.5: RESPONDENT TYPE (check only one)**

- Participants
- Supervisors

**SECTION 4: ADDITIONAL COURSE INFORMATION**

These courses are intended to:  maintain an individual's/team's existing capability  build a new individual/team capability

Do the majority of employees in these courses have fewer than 12 years of formal education?  Yes  No

Is participation voluntary or mandatory for the majority of employees in this course type?  Voluntary  Mandatory

**SECTION 5: EVALUATION DATA**

# of courses included in data: \_\_\_\_\_ # individuals responding: \_\_\_\_\_ # individuals not responding: \_\_\_\_\_

	Never/Rarely (count)	To a small extent (count)	To a moderate extent (count)	To a great extent (count)	Often/Always (count)	Non applicable (count)	Non respondents (count)
1							
2							
3							
4							
5							

6							
7							
8							
	Minimum Value		Maximum Value			Mean Value	
	Non-Respondents (count)						
9							
10							

**SECTION 6: DELIVERY METHOD (check only one)**

- Classroom (Instructor-led or Advanced Technology) (if checked, skip final two sections)
- Learning Technologies (if checked, continue to Sections 7 & 8)
- Other Self-paced Instruction (if checked, skip final two sections)

**SECTION 7: PRESENTATION METHOD (check only one)**

- CBT (text only)
- Interactive TV
- Groupware
- Electronic Performance Support
- Multimedia
- Teleconferencing
- Virtual reality
- System (EPSS)

**SECTION 8: DISTRIBUTION METHOD (check only one)**

- Cable TV
- Extranet
- Local Area Network (LAN)
- Voicemail
- CD-ROM
- Internet
- Satellite TV
- Wide Area Network (WAN)
- Electronic Mail (email)
- Intranet
- Simulator
- World Wide Web

## DEFINITIONS

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### COURSE TYPES

**Customer relations** training refers to training on how to improve customer relations and provide customer service. Includes client-relations training for customer service/telephone/call center operators.

**Sales and dealer** training is provided to the sales force, franchisees, and dealers to develop the attitudes, skills, and habits needed to demonstrate the effectiveness of their products and services and to influence the purchasing decisions of prospects and customers.

**Product knowledge** training refers to training about the products and services of the company.

**Managerial/supervisory skills** training refers to programs to improve the ability and effectiveness of employees to lead, manage, and supervise projects and teams/groups. Topics include human resource management, project management, process management, and planning and budgeting.

**Quality, competition and business practices** training includes all Total Quality Management, business process re-engineering, change management, benchmarking, resource planning, business ethics, business fundamentals, and time management courses.

**Executive development** programs develop the leadership and vision of current and potential senior executives. Such programs focus on responsibilities and challenges for leading corporate-wide initiatives and/or major business units. Includes strategic planning, policy, and goal setting.

**Interpersonal communication** training refers to training in communication and cooperation among individuals and groups, including conflict resolution, stress management, diversity training, teamwork and group dynamics.

**Occupational safety/compliance** training is instruction provided to meet Environmental Health & Safety requirements, Equal Employment Opportunity and Affirmative Action requirements, right-to-know, and government-mandated training.

**Information technology skills** training refers to training in the use of the company's information technology and systems, including off-the-shelf and company-specific software such as word processing, spreadsheets, databases, graphics, and communications. Also includes training for information technology professionals on the programming, support, maintenance, and administration of these internal systems.

**Basic skills** training refers to development and/or remedial training fundamental to the workplace in courses such as literacy, reading comprehension, writing, math, English as a second language, and learning how to learn.

**New employee orientation** training is designed to provide new employees with uniform introductory information about the company, its organization, mission, functions and policies, compensation, benefits, services, work requirements, standards, rules, safe work habits, and desirable employee-management relations.

**Technical processes and procedures** training refers to training that focuses on the company's processes and procedures to create and maintain its products and deliver its services. Includes training provided to employees who operate, maintain, and use machinery, except information technology.

**Professional skills** training refers to training in a specialized body of knowledge or expertise such as accounting, engineering, manufacturing systems, optics, electronics, mechanics, materials science, chemistry, physics, legal, medical, financial services, banking, and consulting. It is discipline- and/or industry-specific.

## **PRESENTATION METHODS**

**CBT (text only):** any learning event that is text-based and computer-delivered.

**Multimedia:** a computer application that uses any combination of text, graphics, audio, animation, and/or full-motion video.

**Interactive TV:** one-way video combined with two-way audio or other electronic response system.

**Teleconferencing:** the instantaneous exchange of audio, video, or text between two or more individuals or groups at two or more locations.

**Groupware:** an integrated computer application that supports collaborative group efforts through the sharing of calendars for project management and scheduling, collective document preparation, email handling, shared database access, electronic meetings, and other activities.

**Virtual reality:** a computer application that provides an interactive, immersive, and three-dimensional learning experience through fully functional, realistic models.

**Electronic performance support system (EPSS):** an integrated computer application that uses any combination of expert systems, hypertext, embedded animation, and/or hypermedia to help a user perform a task in real time quickly and with a minimum of support by other people.

## **DISTRIBUTION METHODS**

**Cable TV:** the transmission of television signals via cable technology.

**CD-ROM:** a format and system for recording, storing, and retrieving electronic information on a compact disc that is read using an optical drive.

**Electronic mail (email):** the exchange of messages through computers.

**Extranet:** a collaborative network that uses Internet technology to link organizations with their suppliers, customers, or other organizations that share common goals or information

**Internet:** a loose confederation of computer networks around the world that are connected through several primary networks.

**Intranet:** a general term describing any network contained within an organization; used to refer primarily to networks that use Internet technology.

**Local area network (LAN):** a network of computers sharing the resources of a single processor or server within a relatively small geographic area.

**Satellite TV:** the transmission of television signals via satellites.

**Simulator:** a device or system that replicates or imitates a real device or system.

**Voicemail:** an automated, electronic telephone answering system.

**Wide area network (WAN):** a network of computers sharing the resources of one or more processors or servers over a relatively large geographic area.

**World Wide Web:** all of the resources and users on the Internet using Hypertext Transport Protocol (HTTP), a set of rules for exchanging files.



**Agriculture, Forestry, Fishing, Mining**

- 101 Agricultural production
- 102 Agricultural services
- 103 Forestry
- 104 Fishing, hunting, and trapping
- 105 Mining

**Construction**

- 106 Building construction
- 107 Heavy construction other than building construction
- 108 Special trade contractors (plumbing, electrical, carpentry, etc.)

**Technology**

- 109 Manufacturing computers and electronic office equipment
- 110 Electronic components and accessories
- 111 Information technology services/consulting
- 112 Computer software manufacturing and development
- 113 Communications equipment
- 114 Communications services (incl. telecommunications, radio, TV)
- 115 Medical instruments and supplies; other precision instruments; photographic equipment

**Manufacturing Nondurables**

- 116 Food
- 117 Tobacco products
- 118 Textile mill products
- 119 Apparel and other fabric products
- 120 Paper and pulp products
- 121 Printing and publishing
- 122 Chemicals and plastics
- 123 Rubber and plastic products
- 124 Petroleum refining and products
- 125 Leather and leather products

*Manufacturing Durables (except electronics)*

- 126 Lumber and wood products, except furniture
- 127 Furniture and fixtures
- 128 Stone, clay, glass, and concrete products
- 129 Primary metal industries
- 130 Fabricated metal products, except machinery and transportation equipment
- 131 Industrial and commercial machinery
- 132 Electrical equipment (excluding electronics)
- 133 Transportation equipment
- 134 Miscellaneous manufacturing industries

**Transportation**

- 135 Railroad transportation
- 136 Local and suburban transit and highway passenger transportation
- 137 Motor freight transportation and warehousing
- 138 Water transportation
- 139 Airlines
- 140 Air letter/parcel services (including U.S. Postal Service)
- 141 Transportation-related services

**Pipelines, Electric, Gas, and Sanitary Services**

- 142 Pipelines, except natural gas
- 143 Electric, gas, and sanitary services

**Wholesale Trade**

- 144 Wholesale trade or distribution—durable goods
- 145 Wholesale trade or distribution—nondurable goods

**Retail Trade**

- 146 Building materials, hardware, garden supply, and mobile home dealers
- 147 General merchandise stores
- 148 Food stores
- 149 Automotive dealers and gasoline service stations
- 150 Apparel and accessory stores
- 151 Home furniture, furnishings, and equipment stores
- 152 Eating and drinking places
- 153 Miscellaneous retail

**Finance, Insurance, and Real Estate**

- 154 Depository institutions
- 155 Nondepository credit institutions
- 156 Security and commodity brokers, dealers, exchanges, and services
- 157 Insurance carriers
- 158 Insurance agents, brokers, and service
- 159 Real estate
- 160 Holding and other investment offices

**Services**

- 161 Hotels and other lodging
- 162 Personal services
- 163 Business services (IT services see code 111)
- 164 Automotive repair, services, and parking
- 165 Miscellaneous repair services
- 166 Motion pictures
- 167 Amusement and recreation services
- 169 Legal services
- 171 Museums, art galleries, and botanical and zoological gardens
- 172 Membership organizations
- 173 Engineering, accounting, research, management, related services
- 174 Miscellaneous services
- 177 Educational services (public and private)

**Health Care and Social Assistance**

- 178 Ambulatory health care services
- 179 Hospitals
- 180 Nursing & residential care facilities
- 181 Social assistance

**Government/Public Administration**

(except public education—see category 177)

- 182 General government administration
- 183 Justice, public order, and safety
- 184 Administration of human resource programs
- 185 Administration of environmental quality programs
- 186 Administration of housing/urban/community development
- 187 Administration of economic programs
- 188 Space research/technology
- 189 National security and international affairs

**Training suppliers**

- 190 Training suppliers