

# Kirkpatrick Blended Evaluation Plan®

## Level 4: Results

The degree to which targeted outcomes occur as a result of the initiative and the support and accountability package

## Organizational Outcome

### Organization Name

*Name of your organization or company, not division, department, or team.*

### Organizational Purpose

*Brief, plain language statement of what the organization does. Example: XYZ Healthcare provides healthcare services to those living in the upper half of Arizona.*

### Organization Mission Statement

*Organization's mission statement, not division, department, or team mission statement.*

## Metrics & Methods to Measure Mission Statement

### Metric(s)

What will be the measure of success?

### Method(s)

Method/tool used to obtain the data or information?


# Initiative Outcomes

## Initiative Name

*Initiative for which this plan is being created.*

## Business Case for the Initiative

*A compelling statement of the importance of this initiative and/or the problem or condition that this initiative would address. Why did stakeholders request this initiative? What problem is the initiative trying to solve? The business case should not focus on the training initiative but rather the performance and strategic organizational benefits. (100 words or fewer)*

## Threats and Benefits

*Statement or list of what is at risk if this initiative is not executed or is unsuccessful, and what can be gained if it is executed successfully. Start with a small threat and then gradually move to the strategic threats as seen by your stakeholders. Then do the same for the benefits but in reverse order starting with the most strategic benefit to the most tactical.*

## Stakeholder Expectations

*List of stakeholder expectations from tactical to strategic. Use the benefits you developed to create this list.*

- 1.
- 2.
- 3.
- 4.
- 5.

## Leading Indicators

*Results and outcomes that are directly related to the initiative and support the organization's mission statement. Leading indicators are shorter-term observations and measurements suggesting that critical behaviors are on track to create an ultimately positive impact on the*

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*mission statement. Typically, the tactical benefits are internal leading indicators. Similarly, the higher-level benefits may serve as external leading indicators. Sequence both groups in order of first occurrence to help tell a story.*

*Important initiatives that warrant a Blended Evaluation Plan® form need six external and six internal leading indicators.*

*See the Resource Library in LearnWorlds for example leading indicators.*

## External Leading Indicators

Customer, client, and/or industry response

1.

Metric(s)	Method(s)

2.

Metric(s)	Method(s)

3.

Metric(s)	Method(s)

4.

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Metric(s)	Method(s)

5.

Metric(s)	Method(s)

6.

Metric(s)	Method(s)

## Internal Leading Indicators

Individual, team, department, and/or organizational outcomes

1.	
<b>Metric(s)</b>	<b>Method(s)</b>
2.	
<b>Metric(s)</b>	<b>Method(s)</b>

3.	
<b>Metric(s)</b>	<b>Method(s)</b>
4.	
<b>Metric(s)</b>	<b>Method(s)</b>
5.	
<b>Metric(s)</b>	<b>Method(s)</b>
6.	
<b>Metric(s)</b>	<b>Method(s)</b>

## Interim Reporting to Stakeholders on Leading Indicators

Stakeholders' expectations regarding how they want leading indicator data provided (e.g., dashboard, written report, presentation), the frequency of the interim reports (e.g., monthly), and who is responsible for providing the interim reports.

**How to Report Interim Data**
**Frequency of Interim Data Reports**
**Who is Responsible for Providing Interim Reports**

## Level 3: Behavior

The degree to which participants apply what they learned during training when they are back on the job

### Critical Behaviors

The few key behaviors that the primary group will have to consistently perform on the job to bring about targeted outcomes. Critical behaviors are:

- Specific, not broad
- Measurable and quantifiable
- Observable

Primary Group to Perform the Critical Behavior

1.

#### Monitoring

Metrics(s)	Methods(s)	Timing Start, Frequency, Duration

2.

#### Monitoring

Metrics(s)	Methods(s)	Timing Start, Frequency, Duration

3.

Monitoring

Metrics(s)	Methods(s)	Timing <small>Start, Frequency, Duration</small>

## Required Drivers

Support and accountability factors that reinforce, monitor, encourage, and reward performance of critical behaviors on the job

See the Resource Library in LearnWorlds for example required drivers.

Methods(s)/ Tools/ Techniques	Timing Start, Frequency, Duration	Relates to which Critical Behavior(s)?		
		1	2	3
Reinforcing				
Encouraging				
Rewarding				

## Monitor & Adjust

How will you ensure that the required drivers occur? Or how will you monitor the monitoring?



## Level 2: Learning

The degree to which participants acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the training

### Brief Description of Training (100 words or fewer)

Training Duration

Training Delivery Method (e.g., in-person, eLearning, etc.)

### Learning Objectives

Statements defining what the group that will perform the critical behaviors on the job must do to perform them properly

After training, participants will be prepared to:

- 1.
- 2.
- 3.

### Components of Learning

Method(s)/ Tool(s)/ Technique(s)	Timing Before, during, or after training
Knowledge   "I know it."	
Skills   "I can do it right now."	
Attitude   "I believe this will be worthwhile to do on the job."	
Confidence   "I think I can do it on the job."	

Commitment I “I will do it on the job.”	
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## Level 1: Reaction

The degree to which participants find the training favorable, engaging, and relevant to their jobs

### Components of Reaction

Method(s)/ Tool(s)/ Technique(s)	Timing
Engagement I The degree to which participants are actively involved in learning	Before, during, or after training
Relevance I The degree to which course content directly relates to participants’ job responsibilities	
Satisfaction I The degree to which participants react favorably to the learning event	

### Necessities for Success

*Prerequisite items, events, conditions, and communications that help leverage success or address problems before they reduce the impact of an initiative*

Issue

Recommended Action

Issue

Recommended Action

Issue

Recommended Action

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## Self-Review of Plan

- Make sure your organization mission statement is the organization's mission statement and not a department, team, or division mission statement
- If multiple levels in your plan have the same information, revisit your plan. Often, the issue is because the leading indicators do not bridge the gap between the critical behaviors in Level 3 and the organization's mission statement.
- Talk through the levels in your plan starting with Level 4, and make sure you have a clear connection between the levels
- Consider whether you have adequate data to show that your initiative was effective (e.g., useful) and that the initiative improved performance and impacted the organization's mission (credibility)
- Consider whether your plan is realistic to execute with the time, money, and resources available

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