ETUI Education

Evaluation: Strategic Procedure for Union Training

QIS - Quality Improvement System

Trainer Manual

This manual aims to guide trainers on the quality improvement system (QIS) for courses provided by ETUI Education and to briefly present the fundamental pedagogical principles and tools.

Why does ETUI want its training sessions to be evaluated?

A training organisation needs to have and use a training evaluation management strategy and system to enhance coherence and impact. The system will also contribute to ensuring good management of public funds made available to the Institute.

The QIS is an ETUI Education training activity and trainer management and monitoring tool for improving the quality of information collection from training participants. It is a bottom-up approach not aimed at control but rather quality and where feedback from participants is the building block.

The standardised tools made available by the QIS will serve as the obligatory lowest common denominator; this will enable evaluation results and their performance over time to be compared and an evaluation culture at the Institute to be strengthened. Nonetheless, these tools will not necessarily cover all monitoring and evaluation needs for all ETUI courses. Trainers may develop supplementary training evaluation methods to the QIS, which is already largely in practice.

There has been a debate on the limited real usefulness of a training evaluation system. Whilst we are aware that evaluation is only one training management tool amongst many¹ and that results may be impacted by a series of factors which place standardised interpretation into perspective, it was decided that the usefulness of the QIS lies in its potential to improve ETUI course quality and not in being an evaluation tool as such. Whilst also being aware that quality improvement is many faceted since it depends on the training policies at union organisations, the professionalisation of training participants and how courses are designed, it was decided that commitment from participants, trainers and union supervisors was essential to effectively implement the QIS, the results obtained and the analysis arising from them.

What are the essentials?

The essentials represent the fundamental principles of the QIS. The following factors are essential:

¹ The evaluation is one of the key stages in the management cycle for projects and training. This includes analysing the situation to change, analysing learning needs, designing the training, implementation, monitoring and evaluation, analysing results and follow-up actions.
- The QIS aims to improve the quality of the courses designed and given by ETUI. It is not a control tool over trainers, partner organisations or the training sessions they organise themselves.
- The clear formulation of training needs and objectives\(^2\) is in direct correlation with evaluation quality\(^3\). Any evaluation questionnaire has to refer to measurable targets (agreed and formalised) in its design and in the analysis of the results it offers.
- One obligatory questionnaire (reaction/satisfaction) at the end of the workshop is the basic evaluation level. Furthermore, focus on quality will be necessary at design level and throughout the course implementation\(^4\)
- Remember that ethical, political and cultural issues are inherent in any evaluation and are deemed as important as the pedagogical side. Trainers call attention to these issues when filling in the questionnaire and will take them into account when analysing the evaluation results.
- At least one formal time slot will be given over to evaluating each training activity and the required time for properly doing this shall be scheduled on the agenda. The evaluation effort and length of the training should be balanced.
- The relevance of the system will depend on the use made or that may be made of the results from the evaluation. The evaluation will be completed when the results are released, as well as the planning and implementation of resulting changes.

Which activities should be evaluated and at what level?

As a reminder, the evaluation levels according to Donald Kirkpatrick and Jack Phillips are as follows:
Level 1: reaction/satisfaction. What did participants feel and think about the training? Were their learning needs and the training well matched?
Level 2: learning. What knowledge, skills and/or attitudes (learning to know, to do and to be) did the participants acquire?
Level 3: behaviour/application. Are participants using what they learnt in the workplace? Which new professional behaviours have they put in place?
Level 4: results/impact. What is the impact of the training on the operation or results of the union organisation?
Level 5: return on investment (ROI). Are the advantages or economies made above the total direct and indirect costs of the training?

The QIS will be used every time a face-to-face or remote training activity is organised by ETUI. The Education Officers will be responsible for ensuring the QIS system is accepted by the union organisations who are partnering in the activity.

\(^2\) Formulating objectives during the course design should match quality criteria for content and process, both at training level as a whole and for each of the sessions. The objectives shall be formulated as specific and applicable results in the form of knowledge, know-how or behaviour (‘learning outcomes’). The ETUI ‘Trainers’ Guide - Design and Implement Effective Learning and Training Events’ from 2013 has a chapter on designing learning outcomes (pp. 13-16) and is recommended for use as a reference on this issue.
\(^3\) Rather than checking whether the expectations of participants have been met, we measure the suitability between the training and the participants’ learning needs, expressed through the training objectives.
\(^4\) Many trainers use a wider selection of evaluation and ‘monitoring’ methods or moments, e.g. ‘Facebook wall comments’ updated by participants from the start of the training; daily evaluation used at the beginning of the following day; written or oral evaluation in roundtable format; e-portfolio and/or skill certification; action plans; information chats with participants to sound out whether their learning needs are being covered.
The level 1 systematic evaluation (reaction/satisfaction; on-the-spot evaluation) will be done for all ETUI training activities. The evaluation will be systematic, i.e. 'all activities shall be evaluated by all participants'. Trainers will emphasise the participants' responsibility in the evaluation process.

Differed level 3 and 4 evaluations six months after the end of the training (behaviour/application and results/impact) will be done for key courses in the Project Management, Training of Trainers and European Young Trade Union Leaders network, as well as for a selection of 10-15% of all other ETUI Education training activities.

What are the QIS tools?

The QIS comprises:
(i) This Manual for Trainers that sets out the main points of the strategic QIS process and recalls the essential pedagogical principles.

(ii) The following evaluation tools:
   a) A standard online end-of-training level 1 questionnaire\(^6\), obligatory for all ETUI courses and filled in by each participant (with mandatory questions and specific optional questions, which need to be selected and used by the education officer. This questionnaire will be available in the working languages on the course and be anonymous. Participants will answer the end-of-activity questionnaire in one of its working languages.
   b) A report template to be filled out by the education officer(s), as well as national trainers\(^7\), who will receive the QIS consolidated results from the evaluation of a given activity.
   c) A differed online evaluation questionnaire\(^8\), filled in by former participants six months after the end of the training activity and aimed at gathering information on the application of the training within the participants' professional context and its impact on the union organisation or beyond it\(^9\).

(iii) An internal evaluation platform managed by ETUI Education comprising:
   a) The ETUI - QIS evaluation Strategy Note.
   b) The forms of the different evaluation questionnaires in all the useful language versions (i.e. the working languages used at ETUI training sessions).
   c) All consolidated end-of-activity evaluation results. The platform will have these results for all evaluated activities. They may be selected on the basis of different criteria using filters: date, topic, supervisor, partner organisation, type.
   d) All trainer reports.
   e) All consolidated follow-up evaluation results for the activities in question. They may be selected on the basis of different criteria using filters: date, topic, supervisor, union organisation, type, country.

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\(^5\) The impact may occur within the union organisation or possibly beyond it.
\(^6\) See Appendix 1. Available on PCs, laptops and tablets; an Application shall be developed for smartphones shortly in order to increase user accessibility.
\(^7\) See Appendix 2.
\(^8\) See Appendix 3.
\(^9\) It is understood that the observed or obtained positive impact at union organisations six months after a training may not be directly attributable to it. Nonetheless, the training may have contributed in some significant way to a change at the organisation.
What are the usage methods?

Good practice identified at ETUI includes presenting and making the evaluation questionnaire available to participants from the start of the training and reminding them about their responsibility for evaluation during the training. Trainers will schedule a time for evaluation at the end of the training to avoid participants having to rush to fill in the questionnaire.

It has been agreed that the evaluation questionnaire will include standard common questions for all training courses and specific optional questions that will not be processed in the general QIS database, but which will be selected by activity education officers on the basis of additional information they deem necessary. The key point still remains: who will manage the use of the results and the feedback, and how.

The preference is for closed questions enabling statistical processing. Participants will provide a score from 1 to 6 for each question using symbols taken from social media (to be sourced). The answers to open questions (qualitative) will be captured by the system but may not be consolidated and compared to one another statistically.

Who has what role and responsibility?

The following roles and responsibilities will be taken on in the quality improvement system at each training stage.

Before the training

ETUI makes the evaluation tools available (on the platform). The Education Officer ensures that the learning objectives are clearly formulated. The standard questionnaire is adapted to the specific training context (title, dates, location). The trainer produces the questionnaire in the working languages of the activity, adding specific activity information (objectives, speakers...) and the possible specific optional questions. The trainer ensures that at least one time slot for the evaluation is scheduled in the training time.

During the training

The Education Officer explains the importance of the evaluation and the process to be used to participants (including possible informal intermediate evaluations). At the end of the training, participants are invited to fill in the online questionnaire during the dedicated time slot (other types of evaluation may be added, where required).

After the training

The QIS will generate a consolidated evaluation report for the activity in question (within a maximum of 7 days) and make it available on the evaluation platform. The education officer will write a trainer report in consultation with the trainers at the partner organisations (preferably within 7 days). These two reports (activity and trainer) will be sent to the contact person and/or trainers at the partner organisations. The results will be available for the ETUI-Education Director over the platform. The trainers shall take into account time management in the evaluation follow-up. Indeed, the shorter the time between the end of the activity and the use of these evaluation results, the more effective will the QIS be.

It has been proposed that the system operate like a short chain where 15 days after the end of the training, Management, Training Supervisor and
Trainers have the participants’ evaluations (consolidated) and the trainer report.

Medium-term

ETUI will produce an analysis report for its governance bodies and pedagogical committee. It will incorporate it into its report to the European Commission. The new ETUI products or communication campaigns may use any key strengths or ‘success stories’ obtained from the trainer reports.

Where the system plans for it, a differed evaluation questionnaire will be prepared and sent to participants from the training courses in question six months after the end of the training activity. The consolidated results from these questionnaires will be produced by the QIS and made available in the database.

How will the results be used?

The aim is for the evaluation inputs to be used to improve subsequent editions of the same training or similar training sessions. The aim is to also have an impact on union organisations. They should pay attention to what comes out of the evaluations.

Furthermore, it should be noted that ‘self-awareness’ of what they have learnt among participants through self-reflection on the evaluation is as important as the learning as such that is acquired during the training activity.

The report generated by the QIS will include the summary of individual responses so as to provide an overview of the evaluation from the participant groups who answered the end-of-activity questionnaire. The individual scores will be presented as an average. The presentation of the evaluation results will be in the form of a table and graphs so as to make them easier to read and communicate.

ETUI Education trainers have suggested that the evaluation questions be subject to a periodic day of exchange (e.g. once or twice a year). This event will aim to produce improvement suggestions for the QIS, to compare problems and solutions for training and evaluation amongst colleagues, and to analyse and discuss dynamics at partner organisations. In general, it involves analysing the practices of Education Officers to highlight those that produce effective and satisfying results and those that require review. It will be a time and place where Education Officers can share and discuss information collected in an informal, safe setting.

How do we know if the QIS is a success?

The quality of the information produced by the QIS as well as its usability will determine the relevance and effectiveness of the system, both for ETUI Education and for partner union organisations. The results should be specific and usable so that they can be a basis for taking decisions.