

The Learning-Transfer Evaluation Model

A Framework on the Outcomes of Learning. Version 13. (Known as LTEM, pronounced “L-tem.”)

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Outcomes Measured In the Work

Tier		
8	Effects of Transfer	<p>Learners’ work performance impacts KEY PERFORMANCE INDICATORS AND KEY STAKEHOLDERS. <u>Possible stakeholders:</u> beneficiaries, learners, the organization, customers, sponsors, coworkers/families/friends, investors, community, society, and the environs, etc.</p> <p><i>Tier-8 should utilize objective metrics and rigorous methods to determine the causal impact of learning—positive, negative, or neutral. Surveys almost always provide weak evidence for KPIs.</i></p>
7	Transfer to Work Performance	<p>Learners PERFORM WORK TASKS AND/OR CREATE WORK OUTPUTS using what they learned. Validated by objective measures of task behaviors and/or outputs—or multiple subjective measures.</p> <p><i>Tier-7 requires rigorous methods to determine the causal impact of the learning program—positive, negative, or neutral. KBIs (Key Behavioral Indicators) can be outlined as generally-worded goals but must be operationalized using valid constructs that are transparent and measurable.</i></p>

Outcomes Measured In the Learning

6	Task Performance	<p>Learners PERFORM RELEVANT REALISTIC TASKS. Demonstrated without unrealistic hints or help. May involve multiple tasks chained together.</p> <ul style="list-style-type: none"> • <u>Assessed Shortly After Learning</u>—measured during or right after learning event. <i>Not a fully adequate metric because learners may forget how to perform.</i> • <u>Assessed for Remembering</u>—measured after several days or more. ADEQUATE TO CERTIFY SUCCESSFUL TASK PERFORMANCE.
5	Decision Making	<p>Learners MAKE DECISIONS GIVEN RELEVANT REALISTIC SCENARIOS. Scenarios should include both relevant and non-relevant information so that learners can demonstrate they know how to evaluate (make sense of) contextual work factors.</p> <ul style="list-style-type: none"> • <u>Assessed Shortly After Learning</u>—measured during or right after learning event. <i>Not a fully adequate metric because learners may forget how to make these decisions.</i> • <u>Assessed for Remembering</u>—measured after several days or more. ADEQUATE TO CERTIFY SUCCESSFUL DECISION MAKING.
4	Knowledge	<p>4A. Learners answer questions about FOUNDATIONAL CONCEPTS—those critical to work decisions.</p> <ul style="list-style-type: none"> • <u>Assessed Shortly After Learning</u>—measured during or right after learning event. <i>Not a fully adequate metric because knowing concepts does not always enable performance.</i> • <u>Assessed for Remembering</u>—measured after several days or more. ADEQUATE TO CERTIFY FOUNDATIONAL KNOWLEDGE.
		<p>4B. Learners answer questions on TRIVIAL KNOWLEDGE—info not central to work decisions.</p> <ul style="list-style-type: none"> • <u>Assessed Shortly After Learning</u>—measured during or right after learning event. • <u>Assessed for Remembering</u>—measured after several days or more. <i>Inadequate measures because knowing facts/terminology does not usually enable performance.</i>
3	Learner Perceptions	<p>3A. Learners are queried in a way that REVEALS INSIGHTS RELATED TO LEARNING EFFECTIVENESS.</p> <ul style="list-style-type: none"> • Measuring: whether learners feel they know, motivation to apply, practice, after-learning support, etc. <i>Such measures can hint at outcomes but should be augmented with objective metrics.</i>
		<p>3B. Learners are queried about CONSTRUCTS NOT RELATED TO LEARNING EFFECTIVENESS.</p> <ul style="list-style-type: none"> • Measuring: learner satisfaction, course reputation; or using poorly-designed metrics. <i>Such measures are inadequate to validate learning success.</i>
2	Learner Activity	<p>Learners ENGAGE IN ACTIVITIES RELATED TO LEARNING. Measures may focus on learner attention, interest, participation, or other learner actions. <i>These measures are not adequate to validate learning success because learners may engage in these activities but not learn, or learn wrong information, or be unmotivated to apply what they’ve learned.</i></p>
1	Attendance/ Completion	<p>Learners ENROLL, START, ATTEND, OR COMPLETE A LEARNING EXPERIENCE. <i>These measures are not adequate to validate learning success because learners may engage in a learning experience but not learn, or learn wrong information, or be unmotivated to apply what they’ve learned.</i></p>

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Helpful Hints on How to Use LTEM

- 1. LTEM** is a conceptual framework enabling flexibility in how things are measured. You will need to select valid metrics for each tier within which you plan to measure.
- 2. LTEM** is designed to measure factors in learning transfer. It has learning wisdom baked into it. For example, it recognizes the importance of measuring remembering after a delay. It suggests we measure more than knowledge, specifically decision-making and task performance.
- 3. LTEM** discourages the use of measuring attendance, completion rates, learner activities, and poorly-designed smile sheets as a way to VALIDATE our learning results. These are deemed inadequate to validate learning, because learners may seem successful on these measures but (a) may not have learned, or (b) learned wrong information, or (c) be unmotivated to apply what they've learned, or (d) be unprepared to take action, etc. We can use these metrics for FORMATIVE purposes—that is, to assess for ourselves what is happening in the learning.
- 4. LTEM's** color scheme has meaning. Red table row measures are NOT AT ALL ADEQUATE to certify or validate learning success (Tiers 1, 2, 3B). Yellow row measures are NOT FULLY ADEQUATE to certify success (Tiers 3A, 4B). Green row measures are ADEQUATE TO CERTIFY SOME LEVEL OF LEARNING SUCCESS (Tiers 4A & up), though no one metric tells the whole story.
- 5. LTEM** conveys the complexity of learning evaluation. Evaluation can be straightforward, as when we survey learners. But to more fully understand learning outcomes, we must engage in a process of discovery, one requiring rigorous methods, expertise, and significant time investment.
- 6. LTEM does NOT** suggest that we measure at all eight tiers. Learning measurement takes time and resources and should only be undertaken where there are benefits. We must prioritize.
- 7. LTEM does NOT** suggest we start at the first tier and move upward. Indeed, it specifically discourages us from trying to validate our learning at Tiers 1, 2, and 3B.
- 8. LTEM does NOT** suggest we always aim for measuring at Tiers 7 and 8. Measuring work performance or the effects of transfer requires rigorous practices involving substantial time and investment. Measuring at Tier 7 or Tier 8 may simply not be worth the investment and can be counterproductive if we fail to measure learning at Tiers 4, 5, and 6—because foundational knowledge, decision making, and task performance provide higher-fidelity information about whether our learning programs were well designed.
- 9. LTEM is NOT** a survey methodology. Will Thalheimer, LTEM's creator, has also developed the Performance-Focused Learner Survey approach; but they are separate things.
- 10. LTEM has many uses, not just for learning evaluation.** It can be used for (a) learning-evaluation gap analysis (examining how you're evaluating now and what you want to do in the future), (b) planning your overall evaluation strategy, (c) credentialing courses, (d) motivating improved learning designs, (e) having sales discussions, (f) brainstorming and prioritizing evaluation options, (g) outlining evaluation goals at the beginning of development, (h) negotiating/discussing possible program outcomes with sponsors or other key stakeholders, and (i) framing evaluation methods to maintain clarity within a complex evaluation project, etc.