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Human resource management — Learning and development metrics

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National foreword

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Contents

Page

Foreword ..... **v**
Introduction ..... **vi**
1 Scope **1**
2 Normative references **1**
3 Terms and definitions **1**
4 Measurement framework **2**
4.1 General 2
4.2 Categories of users 2
4.3 Reasons to measure 3
4.4 Types of metrics 3
4.5 Types of reports 4
5 Recommended metrics **5**
5.1 General 5
5.2 Senior organization leader 9
5.2.1 General 9
5.2.2 Outcome metrics 9
5.2.3 Effectiveness metrics 9
5.2.4 Efficiency metrics 10
5.2.5 Example of a senior leader scorecard 10
5.3 Group or team leader 11
5.3.1 General 11
5.3.2 Outcome metrics 11
5.3.3 Effectiveness metrics 12
5.3.4 Efficiency metrics 12
5.3.5 Example of group leader scorecard 12
5.4 Head of learning 13
5.4.1 General 13
5.4.2 Outcome metrics 13
5.4.3 Effectiveness metrics 13
5.4.4 Efficiency metrics 14
5.4.5 Example of head of learning scorecard 15
5.5 Programme manager 16
5.5.1 General 16
5.5.2 Outcome metrics 17
5.5.3 Effectiveness metrics 17
5.5.4 Efficiency metrics 17
5.5.5 Example of programme manager scorecard 17
5.6 Learner 18
5.6.1 General 18
5.6.2 Outcome metrics 19
6 Description of recommended metrics **20**
6.1 General 20
6.2 Active communities of practice 20
6.3 Active members in communities of practice 21
6.4 Application of learning (level 3) 21
6.5 Average formal learning hours 21
6.6 Budget 22
6.7 Competency rating 22
6.8 Completions 22
6.9 Completion date 22
6.10 Completion rate 22
6.11 Cost reduction 22

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6.12 Courses available ... 23
6.13 Courses used ... 23
6.14 Documents accessed ... 23
6.15 Documents available ... 23
6.16 FTE in L&D ... 23
6.17 Job performance ... 23
6.18 Impact (level 4) ... 24
6.19 Learning (level 2) ... 24
6.20 Objective owner satisfaction (level 1) ... 24
6.21 Objective owner expectations met ... 25
6.22 Participant reaction (level 1) ... 25
6.23 Percentage of courses available by type of learning ... 25
6.24 Percentage of employees reached by learning ... 25
6.25 Percentage of employees who have completed training on compliance and ethics ... 26
6.26 Percentage of employees who participate in formal learning ... 26
6.27 Percentage of employees who participate in formal learning by category ... 26
6.28 Percentage of employees who participate in informal learning ... 26
6.29 Percentage of employees with individual development plans ... 26
6.30 Percentage of employees using the learning portal ... 26
6.31 Percentage of leaders who have participated in leadership development programmes ... 27
6.32 Percentage of leaders who have participated in training ... 27
6.33 Percentage of courses developed on time ... 27
6.34 Percentage of courses delivered on time ... 27
6.35 Performance support tools available ... 27
6.36 Performance support tools used ... 28
6.37 Reach ... 28
6.38 Results (level 4) ... 28
6.39 Return on investment (level 5) ... 28
6.40 Target audience ... 28
6.41 Total cost (organization) ... 29
6.42 Total documents accessed ... 29
6.43 Total hours used ... 29
6.44 Total participants ... 29
6.45 Total performance support tools used ... 29
6.46 Unique employees in L&D ... 30
6.47 Unique hours available ... 30
6.48 Unique hours used ... 30
6.49 Unique participants ... 30
6.50 Unique performance support tool users ... 30
6.51 User satisfaction with learning portal (or content) ... 30
6.52 User satisfaction with communities of practice ... 31
6.53 User satisfaction with performance support tools ... 31
6.54 Unique users of content ... 31
6.55 Utilization rate ... 31
6.56 Workforce competency rate ... 31

7 Reporting of metrics ... 31
7.1 General ... 31
7.2 Senior organization leaders ... 32
7.3 Group or team leaders ... 32
7.4 Head of learning ... 32
7.5 Programme managers ... 32
7.6 Individuals ... 32

Annex A (informative) **Examples of reports ... 33**

Annex B (informative) **Participant estimation methodology ... 40**

Bibliography ... 42

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO document should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

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For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 260, *Human resource management*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

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Introduction

A well-conceived measurement and reporting strategy is necessary to ensure organizational and individual development processes are managed efficiently and effectively to produce the desired outcomes. This document provides a framework and the concepts, metrics, descriptions and guidance necessary to create a basic measurement and reporting strategy.

ISO 30422 provides guidance on a systematic process model for learning and development (L&D) to help managers and others ensure that L&D occurs in the most efficient and effective way to deliver intended outcomes. While it includes a clause on evaluation, describing the reasons to measure and the benefits expected to accrue from measurement, it does not include recommendations for specific metrics or provide guidance on definitions, purpose or use.

ISO 30422 identifies the need to address both individual and organizational outcomes as well as the efficiency and effectiveness of the L&D programmes (see ISO 30422:2022, Figure 1).

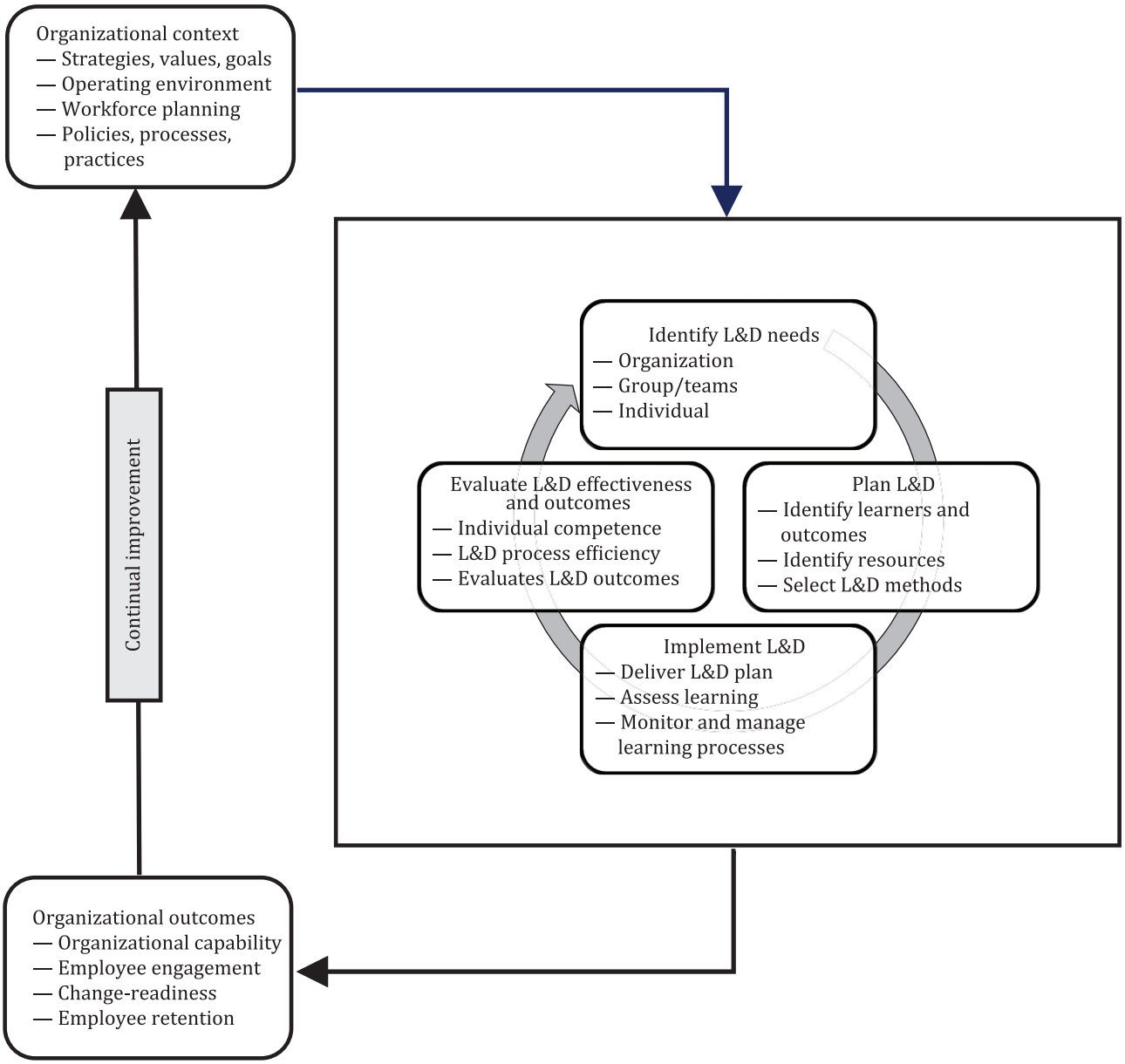


Figure 1 — Learning and development process

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This document follows that guidance by focusing on three types of metrics (efficiency, effectiveness and outcome) deployed over five categories of user (senior organization leader, group or team leader, head of learning, programme manager and individual) to measure learning. This framework is used to provide specific guidance on how to measure L&D, including recommended metrics by user and by size of organization. A list of recommended metrics and an example of their use in a scorecard are provided for each user. In total, more than 50 metrics for formal and informal learning are described, including formulae and worked-out examples where appropriate. Guidance is also provided for selecting the most appropriate report to share the metrics. Four types of reports are described and illustrated by example, including scorecards, dashboards, programme evaluation reports and management reports.

NOTE Small-to-medium organizations will possibly not have a dedicated learning department or head of learning. Instead, there could be one or more employees throughout the organization with responsibility for learning.

This document also incorporates guidance from ISO 30414. All eight of the learning-related metrics from ISO 30414 are included.

Detailed guidance on the limited number of learning-related metrics from ISO 30414 can be found in ISO/TS 30428. The L&D metrics described in ISO/TS 30428 are included in this document but greater detail is provided in ISO/TS 30428.

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Human resource management — Learning and development metrics

1 Scope

This document provides recommendations on how to measure learning. Since the selection of metrics depends on the reason to measure and the user of the metrics, and since a balanced set of metrics is important to avoid unintended consequences, the document begins with a framework for organizational learning and development (L&D), including five categories of users, four broad reasons to measure and three types of metrics. This framework is then used to recommend 50 metrics organized by user, type of metric and size of organization, and provide a description of each. The document concludes with guidance on reporting metrics, including a description of the different types of reports and guidance on their selection based on the user's reasons for measuring.

Metrics for both formal and informal learning are included. The guidance is intended for all types of organizations, including commercial and nonprofit, as well as for all sizes. No previous knowledge of L&D metrics is required, although those new to L&D measurement can consult the suggested references on matters of frameworks, metrics and programme evaluation to learn more.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 30400, *Human resource management — Vocabulary*

ISO 30414, *Human resource management — Guidelines for internal and external human capital reporting*

ISO 30422:2022, *Human resource management — Learning and development*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 30400, ISO 30414 and ISO 30422 and the following apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org/

3.1
programme
course or series of courses with similar learning objectives designed to accomplish an organizational objective or need

Note 1 to entry: Programmes can include different types of learning, such as instructor-led, e-learning and informal learning. For example, a programme to improve leadership could begin with some e-learning to convey basic concepts, continue with an instructor-led course to discuss and role-play and end with the provision of performance support tools and coaching.

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