

CHIEF LEARNING OFFICER®

LEARNINGELITE  
The best companies in learning + development

# 2020 SCORING RUBRIC

## GENERAL INSTRUCTIONS AND GUIDELINES

1. You may find it helpful to print this document for reference.
2. Before judging or entering scores, read through the full application to understand the entire submission and the applicant's full story.
3. As you read through the application make note of any elite/unique tactics, approaches or outcomes. You will need to highlight one elite feature at the conclusion of your assessment.
4. For each item, select the score that best represents the applicant's response (*Underdeveloped*, *Standard*, *Best* or *Elite*).
5. As a general rule, *Best* and *Elite* answers will be substantive, with specific examples of the organization's L&D practices and outcomes.
6. Category indicators are cumulative. A *Best* response will show evidence from the *Standard* category and an *Elite* response will show evidence from the *Best* category.
7. On questions 18–20, you have an opportunity to provide open-ended comments about the application.
8. The LearningElite attracts organizations large and small, national and international, first-time and returning. As such, there may be differences in quality and formatting between applications. Please rate questions based on the substance of the answers. Organizations should neither be penalized for typos nor rewarded for formatting.
9. There may be instances where organizations answer questions out of order. For example, the learning strategy may be addressed in the answer to question 4, rather than question 1. If this practice is pervasive, you may find it useful to assess the application holistically, rather than question by question.
10. This rubric is provided as a guideline for judges. You should base your ratings on the suggested guidelines and indicators provided as well as your own professional judgment based on your experience.

For questions, contact the judging coordinator. This year, your judging coordinator is Tim Harnett. Phone: 312-967-3471. Email: [tharnett@humancapitalmedia.com](mailto:tharnett@humancapitalmedia.com).

## GUIDELINES BY QUESTION

### Learning Strategy

**Question 1:** Describe your learning strategy and explain how it aligns with your business strategy and objectives.

Underdeveloped	Standard	Best	Elite
Presents learning strategy that has no relation to the business strategy.	Provides limited learning strategy details that are related to the organizational strategy.	Meets requirements of <i>Standard</i> .  Thoughtfully integrates the learning strategy with the organizational strategy.  Aligns qualifications, skills and workforce competencies to organizational requirements.	Meets requirements of <i>Best</i> .  Demonstrates an innovative or uniquely tailored solution for that organization.  <i>(Example: Demonstrates a 360-degree alignment to industry partners, suppliers and external customers.)</i>

**Question 2:** Describe how your learning strategy is implemented.

Underdeveloped	Standard	Best	Elite
Conducts basic needs analysis.  Offers preliminary communication of strategy.  Indicates a possible plan for change management.  Indicates thinking about assessment.	Establishes targets and objectives based on needs analysis.  Builds strategy off needs with adequate communication of the strategy.  Shows a demonstrable plan for change management.  Establishes assessment practices.	Meets requirements of <i>Standard</i> .  Describes a detailed needs analysis based on business impact.  Clearly defines business needs, learning goals and evaluation in the learning strategy.  Shows how change management positively impacts implementation.  Demonstrates assessment fully aligned to implementation.	Meets requirements of <i>Best</i> .  Demonstrates an innovative or uniquely tailored solution for that organization.  <i>(Example: Implements strategy across value chain: industry partners, suppliers and external customers.</i>  <i>Implementation exceeded expectations.)</i>

**Question 3:** Provide the best example of a key performance indicator metric you use to measure the impact of your learning strategy. Discuss results along with strategic outcomes.

Underdeveloped	Standard	Best	Elite
Indicates awareness of strategic outcomes and KPIs with minimal description.	<p>Discusses strategic outcomes and links outcomes to learning strategy measured by metrics.</p> <p>Lists one or more S.M.A.R.T. (specific, measurable, achievable, relevant and timely) KPIs.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Fully aligns strategic outcomes to metrics and learning strategy.</p> <p>Describes a business impact or other positive impact result directly correlated to the learning strategies described in Q2.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Practices data mining to determine the connection between learning hours, improved skills proficiency and direct return of profit from improvement.)</i></p>

### Leadership Commitment

**Question 4:** How does the learning function at your organization engage senior leadership in employee development, and how do you know that you've been successful?

Underdeveloped	Standard	Best	Elite
Provides senior leadership with an overview of strategic outcomes of the L&D function.	<p>Involves senior leadership in learning events as faculty and participants, developing content and fostering a culture of learning.</p> <p>Communicates the strategic importance of learning to the organization. Learning leaders make the case for learning at the senior leadership level.</p> <p>Leadership recommends participants for development, mentoring, training and coaching.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Actively engages top leadership in collaboration with the learning function to develop learning strategies and outcomes that meet organizational needs.</p> <p>Demonstrates how learning leaders make the business case for learning to senior leadership and speak the language of the business.</p> <p>Involves leaders in mentoring/coaching programs and in formal programs as faculty and/or subject matter experts.</p> <p>Shows how the L&amp;D communications plan includes strategies for creating buy-in among senior leadership.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Conducts biweekly or quarterly meetings with the CEO to review key metrics of the learning function and make adjustments as priorities change.</i></p> <p><i>Establishes a learning council with members from business lines as well as learning leaders.)</i></p>

**Question 5:** How does the learning function at your organization engage line level leadership in employee development and overcome the obstacles they may have to allowing employees time to learn and educational opportunities that may promote them out of their current roles?

Underdeveloped	Standard	Best	Elite
<p>Provides line leaders with an overview of strategic L&amp;D outcomes.</p>	<p>Involves line leaders in learning events as faculty and participants, fostering a culture of learning.</p> <p>Communicates the strategic importance of learning to the organization and line leaders. Learning leaders make the case for learning at the line leadership level.</p> <p>Has line leaders recommend participants for development, mentoring, training and coaching.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Has learning leaders make the business case for learning to line leaders and speak the language of the business.</p> <p>Sets clear expectations about employee development. Expectations are communicated to line leaders by senior leadership.</p> <p>Has the learning team support line leaders in the touchpoints of employee development.</p> <p>Provides clear direction on expected coaching behavior and learning outcomes for developing employees.</p> <p>Has an L&amp;D communications plan that includes strategies for creating buy-in among line-level leadership.</p> <p>Addresses barriers that may exist at the line-level to effective employee development.</p> <p>Holds line leaders accountable for developing direct reports and ensuring needed learning is taken.</p> <p>Rewards line leaders for developing direct reports, either through bonuses or recognition of some kind.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Line leaders are provided with a coaching toolkit that helps to set expectations about employee development.</i></p> <p><i>Employee development goals are included in performance review/assessment for line leaders.)</i></p>

**Question 6:** What specific practices are utilized by your learning function to create and maintain a culture of learning? What is the employee value proposition for learning at your organization?

Underdeveloped	Standard	Best	Elite
<p>Leaders are aware of learning initiatives.</p> <p>Steps are taken to assess the strength of the learning culture of the organization.</p> <p>The value of learning is communicated to employees.</p>	<p>L&amp;D communications plan includes messaging to employees on the value of learning for the organization and for employees.</p> <p>Leadership supports cultural change to improve the learning culture of the organization.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Leadership leads cultural change to improve the learning culture of the organization.</p> <p>Organization has a clear employee value proposition for learning.</p> <p>Learning is integrated with communications on career advancement so that employees have a clear understanding of the skills and capabilities needed for advancement and how to obtain them.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Provides learning leaders with opportunities to speak during major leadership meetings, both internal and external.)</i></p>

## Learning Execution

**Question 7:** Describe the process you follow for evaluating the learning needs of your L&D customers.

Underdeveloped	Standard	Best	Elite
<p>Has an L&amp;D team that serves as an order taker for other internal departments.</p> <p>Has a reactive approach to assessing needed skills.</p>	<p>Has both a reactive and proactive model.</p> <p>Has an L&amp;D team that anticipates learning needs.</p> <p>Presents a competency model and assesses learning needs to fill gaps at the role level.</p> <p>Focuses only on outcomes.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Has a more advanced proactive model.</p> <p>Anticipates learning needs based on corporate strategy and knowledge of future direction.</p> <p>Works with executive team to determine knowledge, skills, attitudes and behaviors to help support and achieve organizational goals.</p> <p>Has a competency model that fills strategic gaps at an individual and role level.</p> <p>Focuses on both outcomes and impact.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Looks for non-learning solutions to business challenges.</i></p> <p><i>L&amp;D team pushes back when leadership thinks every problem can be solved with more training. In many cases the needs analysis reveals that perceived need is not in fact a real need, or [in the case of a real need] that a training program is not the solution to the need.)</i></p>

**Question 8:** Describe the process you follow to develop and deliver learning solutions, including on-the-job support where and when your L&D customers need it.

Underdeveloped	Standard	Best	Elite
<p>Indicates a standardized process for developing and delivering learning solutions.</p> <p>Provides unblended models.</p> <p>Focuses on limited types of delivery methods.</p> <p>Indicates some on-the-job support.</p> <p>Indicates some measurement of job impact.</p>	<p>Has a standardized process with some agility.</p> <p>Has a learner-centric model that is driven by delivery method.</p> <p>Uses blended models that appeal to a variety of learning styles.</p> <p>Indicates some access to tools when and where learners need them.</p> <p>Evaluates the impact of learning by employing primarily Kirkpatrick Level 1 with surveys and Level 2 post-assessments.</p> <p>Modifies programs based upon results of evaluation outcomes.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Has a flexible and complex process for strategic initiatives.</p> <p>Has learning that is flexible, responsive and adaptive, with a focus on learner motivation and engagement.</p> <p>Designs skill transfer into program.</p> <p>Uses blended models.</p> <p>Provides real-time on-the-job support.</p> <p>Employs most or all levels of the Kirkpatrick model.</p> <p>Uses additional custom evaluation approaches as needed.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Incorporates stages of learning development to improve the effectiveness of training, including:</i></p> <ul style="list-style-type: none"> <li><i>• Developing strategies to prepare employees for learning.</i></li> <li><i>• Developing targeted training that provides specific knowledge and skills required for improved job performance.)</i></li> </ul>

**Question 9:** Describe how technology supports your learning operation.

Underdeveloped	Standard	Best	Elite
Indicates a standalone technology system that may drive the learning strategy.	Has partially integrated learning systems.	Meets requirements of <i>Standard</i> .  Fully integrates learning technology strategy. Uses a variety of learning delivery methods.  Uses technology that provides a solid foundation tool for the learning strategy, supportive of learning.	Meets requirements of <i>Best</i> .  Demonstrates an innovative or uniquely tailored solution for that organization.  <i>(Example: Establishes a social learning consultant role with responsibility to work with learning designers and technologists to integrate the best practices and processes into the creation of the learning environment.)</i>

**Question 10:** In the last 12 months, describe how you have developed your learning and development staff. Also discuss any future developmental plans.

Underdeveloped	Standard	Best	Elite
Develops L&D staff the same as all other staff.	Provides L&D staff with standardized learning plans.  Requires the L&D team to complete a specific number of training hours.	Meets requirements of <i>Standard</i> .  Provides L&D staff with customized learning plans.  Ensures L&D staff is built into succession plans.  Provides financial assistance for external learning opportunities.	Meets requirements of <i>Best</i> .  Demonstrates an innovative or uniquely tailored solution for that organization.  <i>(Example: L&amp;D staff is afforded opportunities to serve as pilot participants for programs, tools and technology.)</i>



## Learning Impact

**Question 11:** How does your CEO/executive team determine the impact/value of the learning organization? (i.e., how does your learning measurement strategy provide key input to leadership decisions on learning and development?)

Underdeveloped	Standard	Best	Elite
Examines a soft measure such as employee or customer satisfaction, which may include additional basic metrics that are occasionally monitored.	Examines custom or industry-specific measures. Measures are reported with some regularity.  Lists harder measures such as productivity and learning impact.  Has impact metrics that may or may not be monetized.	Meets requirements of <i>Standard</i> .  Reviews static dashboards or scorecards frequently.  Standardizes and regularly reports hard measures such as ROI and financial metrics.  Lists L&D-specific metrics as well as business metrics.	Meets requirements of <i>Best</i> .  Demonstrates an innovative or uniquely tailored solution for that organization.  <i>(Example: Business metrics include use of profit and loss or income statement, projective models, labor costs and fixed and variable costs.)</i>

**Question 12:** What metrics do you use to assess the effectiveness of your learning strategy and solutions? What results have you experienced? (i.e., how does your learning measurement strategy demonstrate the effectiveness and efficiency of your learning strategy and solutions?)

Underdeveloped	Standard	Best	Elite
Reports rudimentary metrics such as learner satisfaction.  Describes low-level outcomes such as learner dissatisfaction leading to program changes.	Reports typical L&D metrics such as Kirkpatrick levels, experimental models, pre- and post-tests and utility analyses.  Begins to link between dollars spent and revenue.  Standardizes measurement strategy.	Meets requirements of <i>Standard</i> .  Describes high-level strategic outcomes that are translated into impact (ROI, business KPIs, cost/benefit analysis).  Showcases organization-specific L&D metrics.  Shows a direct link between dollars spent and revenue.  Has a dynamic measurement strategy.	Meets requirements of <i>Best</i> .  Demonstrates an innovative or uniquely tailored solution for that organization.  <i>(Example: Analyzes HR data like performance review ratings to target specific kinds of learning opportunities for employees.)</i>

### Business Performance Results

**Question 13:** Give an example of an action taken by the L&D function that positively impacted the organization based on business performance results.

Underdeveloped	Standard	Best	Elite
Gives nonstrategic examples.	<p>Takes an example from Q16 to illustrate the link between L&amp;D's contribution to the impact on a corporate KPI.</p> <p>Shows a clear link between L&amp;D's action that yielded positive organizational impact.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Describes an exceptional business performance result that was driven by an action taken by L&amp;D.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Conducts comparative analysis of training taken by high- and low-performers to determine the direct contribution of L&amp;D to employee productivity.)</i></p>

**Question 14:** How is learning and development in your organization advancing your organization's industry? (i.e., manufacturing, consulting, education, etc.)

Underdeveloped	Standard	Best	Elite
<p>Indicates awareness of industry beyond the organization.</p> <p>Names some industry-related performance indicators present in the organization.</p>	<p>Highlights a clear link among L&amp;D performance, organization performance and industry movement.</p> <p>Displays evidence of the linkage.</p> <p>Explains an industry innovation that the organization drove with an L&amp;D contribution.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Shows evidence that they value and support industry innovation.</p> <p>Demonstrates how innovation is a strategic initiative and fully supported or driven by L&amp;D.</p> <p>Presents links between L&amp;D performance and organizational performance.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: The alignment between L&amp;D and industry advancement is clear, measured and reported with relative frequency.)</i></p>

## Comprehensive

**Question 15:** How has your organization contributed to the advancement of the learning and development field?

Underdeveloped	Standard	Best	Elite
Shows little to no awareness of the greater L&D field.	Shows basic awareness of the greater L&D field.	Meets requirements of <i>Standard</i> .	Meets requirements of <i>Best</i> .
Shows limited involvement in the field.	Senior leaders or a few staff members actively contribute to the field.	Senior leaders and staff members are active contributors to the L&D field.	Demonstrates an innovative or uniquely tailored solution for that organization.
Consumes (but does not produce) L&D information.	Is involved at the local level.  Attends L&D conferences as participants.	The organization may have an L&D thought leader or publish thought leadership.  Actively attends industry conferences as participants, presenters or panelists.	Funding is provided to L&D staff to contribute. L&D staff are evaluated on their contribution to the L&D field.  <i>(Example: Is frequently present at industry conferences.)</i>

**Question 16:** What are the top three priorities for learning and development at your organization for the next year?

Underdeveloped	Standard	Best	Elite
Alludes to challenges with limited specific details.	Highlights typical business challenges such as competitiveness, profitability and process.	Meets requirements of <i>Standard</i> .	Meets requirements of <i>Best</i> .
Shows awareness of strategic plans with limited examples.	Describes somewhat typical solutions to somewhat typical challenges.	Highlights atypical business challenges beyond competitiveness, profitability and process.	Demonstrates an innovative or uniquely tailored solution for that organization.
Shows awareness of the need to link between challenges and L&D action plan with limited demonstration of link.		Highlights innovative solutions to atypical challenges.	<i>(Example: Highlights unique or industry-specific challenges and describes highly unique L&amp;D solutions, possibly leveraging multiple facets of the organization.)</i>

**Question 17:** What is it about your efforts that qualify you as a member of the LearningElite?

Underdeveloped	Standard	Best	Elite
<p>Restates previous responses.</p> <p>Provides argument with limited specific examples.</p>	<p>Provides examples of qualifications.</p> <p>Highlights some differences at a strategic level.</p> <p>Positions L&amp;D as an important component of the enterprise, but may not be at a strategic level.</p>	<p>Meets requirements of <i>Standard</i>.</p> <p>Illustrates there is a true differentiation from other learning organizations.</p> <p>Positions L&amp;D as a strategic component of the enterprise (this is shown by the level of funding and organizational structure).</p> <p>Demonstrates that L&amp;D is a key player in maintaining strategy and innovation across industry partners, suppliers and external customers.</p>	<p>Meets requirements of <i>Best</i>.</p> <p>Demonstrates an innovative or uniquely tailored solution for that organization.</p> <p><i>(Example: Analyzes consumer needs and directly addressing this with training. Supporting new and innovative technologies through industry collaborations. Improves access to social learning for a broad audience.)</i></p>