

Procedures for Conducting Formative Evaluation

These basic procedures can be used for conducting learner try-outs or field tests. They are divided into the following three phases:

- Preparation
- Implementation
- Analysis

Preparation

- **Review instruction** - Review the instructional materials to better understand what needs to be measured, and list any specific issues you want to focus on.
- **Customize checklists and interview sheets** - We suggest you develop templates for checklists and interview sheets that you can customize to meet the needs of each try-out or field test.
- **Select learners** - We recommend 4 - 6 learners for a try-out and 12 - 20 for a field test. Be sure to select learners that represent all facets of the audience. Include, for example, new hires, experienced people, experts, and novices.
- **Train and rehearse observers and coaches** - Coaches and observers should practice completing the checklists and conducting interviews while someone on your staff plays the role of a learner. This rehearsal makes sure the entire team is ready for the first group of sample learners.
- **Develop agenda** - Once you have practiced, you can more accurately estimate the time needed for preparing subjects, conducting the test, and collecting data.
- **Design facility layout** - Make sure you have enough room and equipment for all participants. Decide where the equipment will go and where observers and coaches will sit.
- **Set up and test facilities** - Two days before the test is to begin, we recommend you set up and test all equipment according to the plan.

Implementation

- **Prepare subjects** - All learners are informed of the purpose and their role in the test in which they are about to participate. A pre-test interview may be conducted at this time.
- **Implement preparatory training** - Many times your prototype for the test is not the first module of the training. You may have to prepare your learners for the module you are testing by giving them any required knowledge or skills. Those who may require preparatory training in order to complete the prototype should receive it at this time. It is also possible that some subjects may have been required to complete some training prior to arriving for the test.
- **Conduct test** - All training prototypes are presented to the learners. The coaches are available to help the subjects when they don't know how to proceed. It is important that the coaches don't try to do any teaching. You must allow the learning program to fail in order to know what needs to be fixed. The coaches can help learners get back on track once you have the data you need.
- **Observe and complete checklists** - While the test is being conducted, the observers complete the customized checklists and take notes.
- **Conduct interviews** - After the test has been completed, the observers conduct interviews according to the customized post-test interview sheets.

Analysis of Results

- **Compile data** - Review all data collected and compile the results. Remember to address all your pre-test issues and questions.
- **Determine needed revisions** - You cannot make every change suggested by one or two learners, but you will quickly be able to identify the trends which will point to the needed revisions. In the case of a learner try-out, you will find trends even among a sampling as small as six people. With field tests, it will be even easier to pick up trends with 12 to 20 learners.

Sample Evaluation Form

Interview each learner in a quiet, private place immediately after the learner try-out is finished. Read and paraphrase the questions any way you need to, so the learner can understand them. Record any significant comments.

1. Start Time: Finish Time:
2. The information is presented in a well-organized manner.
Strongly Agree 1 2 3 4 5 Strongly Disagree
Comments:
3. The writing style is friendly and easy to read.
Strongly Agree 1 2 3 4 5 Strongly Disagree
Comments:
4. The questions are easy to understand and appropriate.
Strongly Agree 1 2 3 4 5 Strongly Disagree
Comments:
5. The length of the lesson seems appropriate.
Strongly Agree 1 2 3 4 5 Strongly Disagree
Comments:
6. I now have a solid understanding of the topics covered in this unit and feel confident applying them on the job.
Strongly Agree 1 2 3 4 5 Strongly Disagree
Comments:
7. I feel that WBT/ILT is a good way to learn this type of topic.
Strongly Agree 1 2 3 4 5 Strongly Disagree
Comments:
8. I do/do not feel that WBT/ILT is a good way to learn because ...
9. Things I especially like or dislike about this course: