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**Exercise 10-1. Your evaluation plan.**

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*Directions:* Complete the following steps for this exercise to help ensure you have the right data for each audience and to finish up step 8 of the financial value process: evaluate results. If you prefer not to write in this book, go to the companion Website ([www.astd.org/astd/publications](http://www.astd.org/astd/publications)) to download a PowerPoint file for this exercise.

1. Because plans often change over time, the first action is to note today's date.
2. Write the name or a brief description of the intervention you will be evaluating.
3. For the Individual level of your audience, write in a short name or description for how you plan to gather level 1 (reaction) data, level 2 (learning) data, and how frequently you plan to do so for each. Data gathering activities may be handing out an evaluation form at the end of a class, informally contacting a subset of the participants, or sending out an email survey. For frequency, you may plan to do this at the end of each class, once a month, or at some other time interval.
4. For the 1st/Ops level of your audience, write in a short name or description for how you plan to gather level 3 (behavior) data and how frequently you plan to do so. Examples of data-gathering techniques may include periodic observation, supervisor interviews, or surveys. The frequency of your data gathering depends on your situation. Examples could be hourly, weekly, monthly, or quarterly.
5. For the Mid level of your audience, write in a short name or description for how you plan to gather level 4 (results) data or level 5 (ROI) data and how frequently you plan to do so. Gathering results and ROI data may be done by conducting interviews, attending status presentations, or reading some of the documents you identified in your business intelligence research discussed in chapter 7. The frequency of your data gathering will depend on the frequency that the behavior is displayed and the frequency that financial or other measurement data is available.
6. For the Senior level of your audience, write in a short name or description for how you plan to gather optimization data. Optimization data is defined as effectiveness (penetration, sustainability, and speed) and efficiency. Penetration, sustainability, and speed are often tied to behavior data, so your frequency may be the same as for your level 3 data gathering. In other cases, effectiveness and efficiency are better analyzed along with level 4 (results) and level 5 (ROI), so the frequency may be tied to how often you will be looking at this information. Each situation is unique, so the best advice is to use your own judgment. Your judgment will improve with experience.

**Step 8: Evaluation Worksheet**

① **Today's Date:** \_\_\_\_\_

② **Your Intervention:** \_\_\_\_\_

<b>AUDIENCE</b>	<b>DATA GATHERING PLAN</b>	<b>FREQUENCY</b>
③ Individual	Level 1: _____ Level 2: _____	_____ _____
④ 1st/Ops	Level 3: _____	_____
⑤ Mid	Level 4: _____ Level 5: _____	_____ _____
⑥ Senior	Optimization: _____ _____	_____