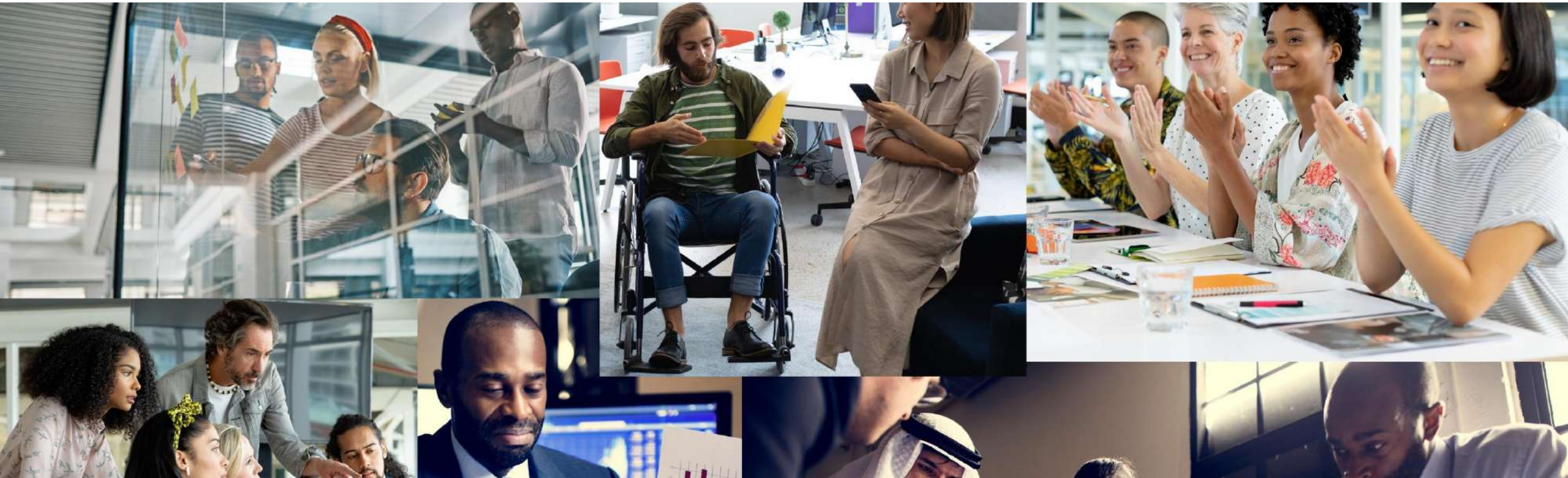


Nine Formative Evaluation Techniques to Build Effective Learning Solutions



Rationale for workshop

Formative evaluation

Additional structure for your formative evaluations

Confidence to ensure deliverables

Improve the impact of your learning solutions



Takeaways

Concept map

Techniques job aid

Three design templates

Small group feedback

Pilot feedback

Implementation communication plan

Generative AI prompts to learn more about formative evaluation



Agenda

All about improving your learning solutions

1. Define
2. When to use
3. Who evaluates
4. Formative evaluation techniques
5. Wrap-up



Agenda

All about improving your learning solutions

1. Define



Evaluation vs. assessment

Solutions are evaluated
(value is judged)

People are assessed to discover their
characteristics and competencies.



Formative evaluation

A process used to improve the

- Feasibility
- Effectiveness
- Clarity
- Impact

of learning solutions

before implementation



Summative evaluation

A process used to validate

- Effectiveness
- Impact

of learning solutions

after implementation

Should we continue the learning solution(s)?



Why Connect with Others?

“When the **cook** tastes the soup,
that's formative.”

“When the **guests** taste the soup,
that's summative.”

— **Bob Stake**



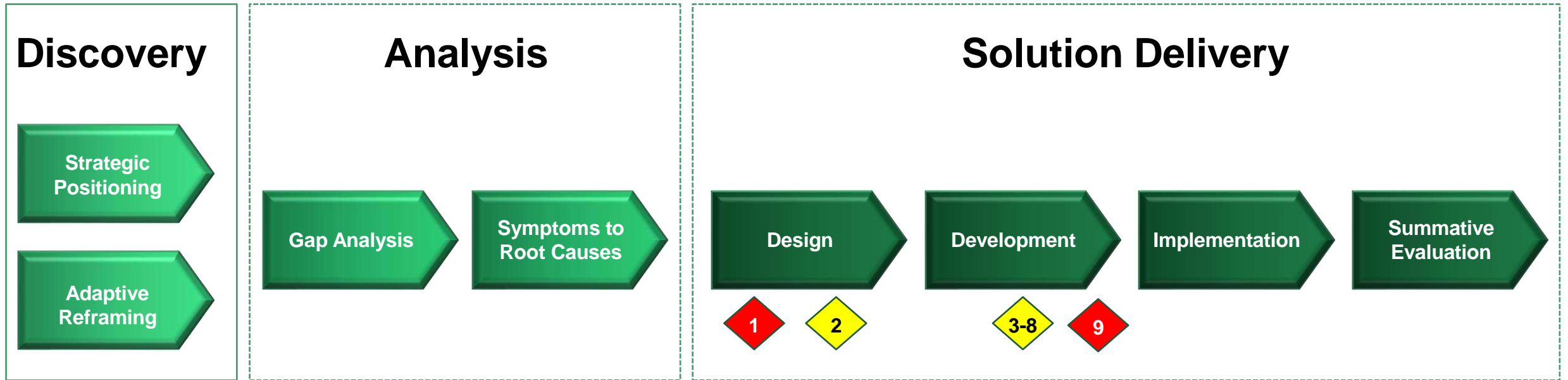
Agenda

All about improving your learning solutions

1. Define
2. When to use



Performance Solution Process



Formative Evaluation Techniques

Design

- 1 High-level Design Approval
- 2 Detail Design Review

Development

- 3 Subject-Matter Expert Walkthrough
- 4 Learner Walkthrough
- 5 Usability Testing
- 6 Technical Editing
- 7 Small-Group Session
- 8 Pilot
- 9 Implementation Readiness Approval

Agenda

All about improving your learning solutions

1. Define
2. When to use
3. **Who evaluates**



Who evaluates?

Subject-matter experts

Design experts

Technical editors

Sponsors

Experienced performers

New performers



Who evaluates?

Often mastered by trial-and-error

Practice skills often

Have trouble explaining how they learned

May have trouble explaining what they do (especially if it is a mental process)



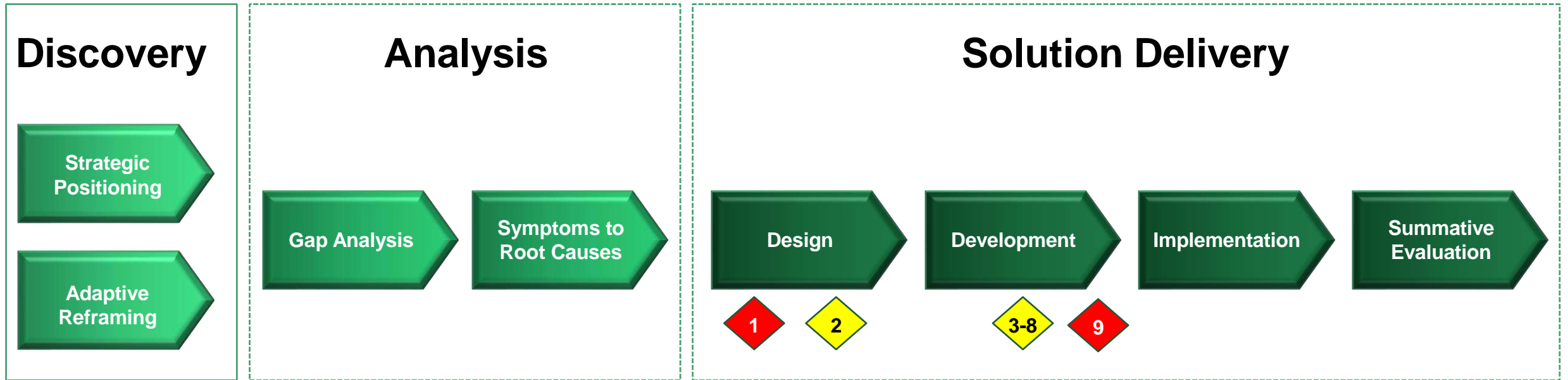
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1. Define
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3. Who evaluates
4. **Formative evaluation techniques**



Performance Solution Process



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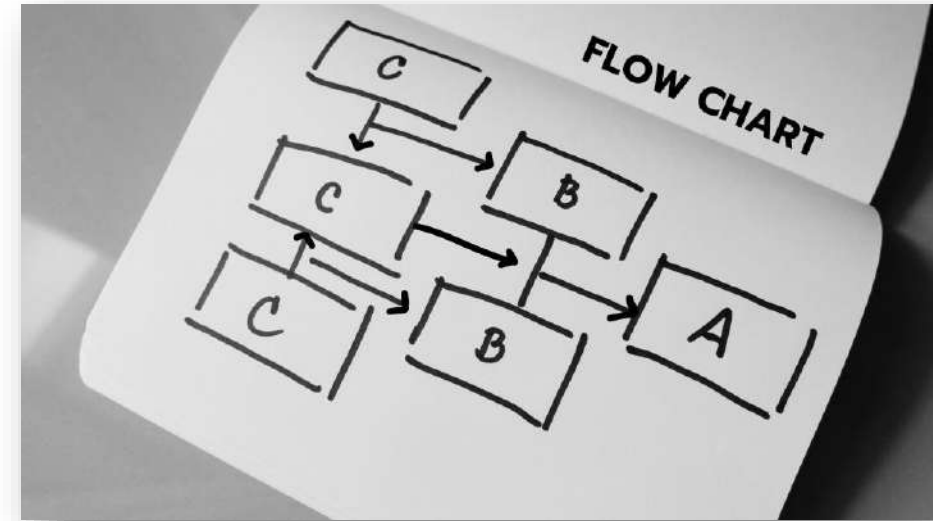
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Technique 1: High-level design approval

1. Learners
 - Environment
 - Tasks
2. Learning goals
3. Modules
 - Purpose
 - Delivery
 - Duration
4. Sequence
5. Assessment plans
6. Evaluation plans
 - Formative
 - Summative
7. Other deliverables
8. Maintenance



Template

High-level design template
Informal version

Technique 2: Detailed design approval

1. Learning objectives
2. Module topics
 - Topics alignment with objectives
 - Content in topics
 - Instructor / Learner directives
 - Content development resources
 - Topic duration
3. Final deliverables
4. Assessment



Template
Detailed design template

Technique 3: SME walkthrough

1. Content

- Is it right?
- Is it complete?
- Is it relevant for the audience?

2. Module and topic sequence

3. Exercises

4. Assessment



Technique 4: Learner walkthrough

1. Overall experience
 - Usability
 - Clarity
 - Engagement
 - Effectiveness
 - Sequence
 - Timing
2. Exercises
3. Assessments



Technique 5: Usability testing

1. Navigation
2. Interactivity
3. Timing
4. UI visual appeal
5. Error messages
6. Consistency
7. Accessibility
8. Performance
(page/feature load)
9. User satisfaction



Technique 6: Technical editing

1. Spelling, grammar, and syntax
2. Clarity and conciseness
3. Consistency
4. Formatting and layout
5. Logical flow
6. Technical quality
(accuracy, completeness, and current)
7. Clarity of instructions
8. Audience appropriateness
9. Visual elements
(labels and alt text)
10. Citations and references
11. Accessibility of content
12. Cross-references
13. Alignment with the design

Technique 7: Small-group session

1. Content delivery
2. Delivery timing
3. Technical editing
4. Exercises
5. Assessments (pre- and post-testing for comprehension and learning)



Template

Small group feedback template

Technique 8: Pilot

1. Content delivery
2. Delivery timing
3. Technical editing
4. Exercises
5. Assessments (pre- and post-testing for comprehension and learning)



Template

Pilot feedback template

Technique 9: Implementation readiness approval

1. Deliverable approval
2. Communication plan approval
3. Schedule
4. Monitoring plan
5. Summative evaluation plan



Template

Communication plan template

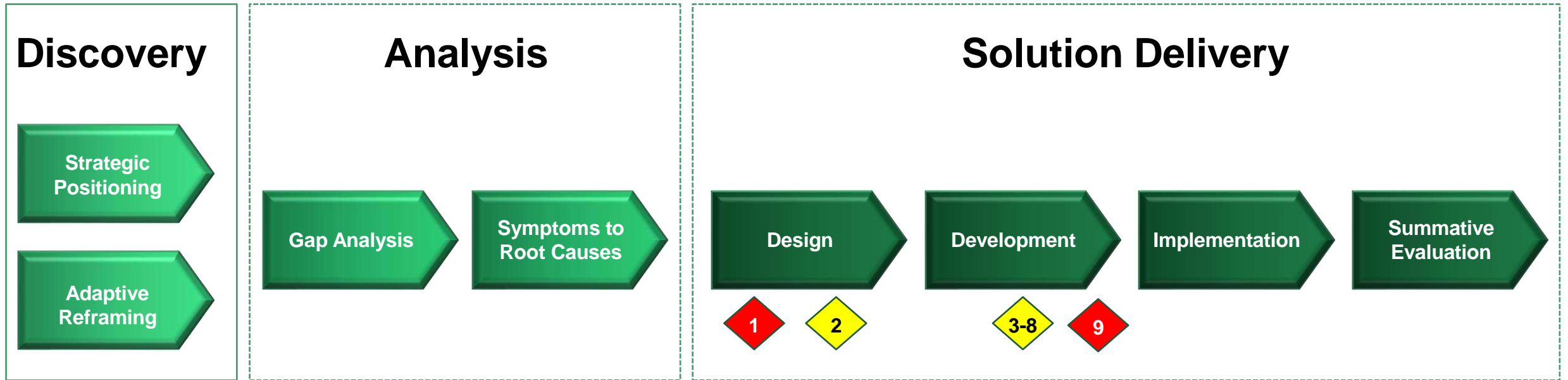
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