Evaluation Project Plan

Project Name: Compliance Guidelines

Action Step	Target Date	Responsibility	Information Source or Comments
PLANNING THE IMPACT STUDY			
1. Identify courseware for evaluation	May18	Mandy	Done
2. Determine purpose and evaluation level of this project.	May18	Design team & Ron	Done, L-4 and L-5
3. Review program/intervention, objectives and content.	May20	Design team & Ron	
4. Identify key stakeholder expectations.	June 8	Design team & Ron	
5. Identify data sets for L-5, L-4 and L-3 measurements (hard and soft) and determine current availability of performance data for these measures.	May 18	Design team & Ron	Done
6. Identify or develop specific objectives and baseline data for each level of follow-up evaluation.	June1	Robert and Brenda, Amber coordinates	Assumes June roll-out of the course.
7. Determine responsibility for L-1 and L-2 evaluation (internal course designer, instructor; or vendor) and how this data will be provided to ROI Institute.	June7	Amber	Amber provides summary to Ron
8. Determine methods and instruments to be used and the timing of data collection.	June7	Design team & Ron	Done
9. Finalize data collection plan and review with client.	June 7	Ron	Mandy/Robert review
10. Draft data collection instruments (interviews, focus groups, follow-up L-3/4questionnaires, etc).	June 7	Ron	Done
11. Client reviews draft follow-up L-3/4 questionnaire	June 7	Amber	Robert reviews
12. Transfer questionnaire to electronic format	June 25	Amber	
13. Select strategy for isolating the effects of training.	June 7	Ron	Done/participant estimates
14. Select strategy for converting data to monetary value.	June 16	Amber and client	Ron: Conference call
15. Identify costs to include in analysis.	June 30	Robert	In-work
16. Finalize ROI analysis plan.	June	Ron	Done
17. Field test follow-up L-3/4 questionnaire and other instruments and revise as necessary.	June 16	Amber	Done
18. Finalize letter (or other communication) to accompany questionnaire/interview and get appropriate executive signature.	June 25	Amber	Done

ROI INSTITUTE™
Phone: 205-678-8101 · Fax: 205-678-8102
Email: info@roiinstitute.net

Project Evaluation Schedule

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Action Step	***Target Date***	***Responsibility***	***Information Source or Comments***
IMPLEMENTATION OF THE IMPACT STUDY			
19. Administer pre-post knowledge questionnaire (30/60 people)	July 8	Amber	
20. Administer letter and follow-up questionnaire	July 8	Amber	
21. Collect data from client records/sample ticket audit	July 15	Robert/Amber	
22. Collect from client records/all errors before Vs after training	July 15	Robert/Amber	
23. Provide data to team to analyze.			
• L-1 and L-2 data	July 20	Amber	
• Pre-post knowledge questionnaire (30/60 people)	July 20	Amber	
• Follow-up L-3/4 Questionnaire	July 20	Amber	
• Errors by specific codes from sample ticket audit records	July 20	Amber	
• Consolidated errors from organization client performance records	July 20	Robert/Amber	
24. Tabulate costs of intervention.	July 10	Robert	
25. Develop introductory information for the report.	July 20	Robert	
26. Analyze data, isolate and convert.	July 30	Ron coaches team	
27. Develop conclusions and recommendations.	August 7	Ron completes and coaches team	
28. Develop report(s) for target audience(s).	August 7	Ron completes and coaches team	
29. Review draft report(s) with project team.	August 10	Ron and team	
30. Present results to target groups.	August 20	Mandy and Amber	

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FOLLOW-UP ACTION			
31. Project critique and lessons learned for the evaluation process.	Aug 25	Ron and team	Review what went well, what can be improved. Next steps for improvement
32. Storage/filing of documentation.	Aug 25	Ron for ROI Institute and Mandy for Amber	
33. Potential utilization of data reported.	Aug 25	Mutual agreement	Amber may want to publish case study

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