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Beyond Knowledge: Evaluating Training Programs for Real-World Impact

SPEAKERS

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Create Your Evaluation Plan

Use this step-by-step worksheet to design a practical, right-sized evaluation you can actually use.

Why plan now? Planning early helps you answer whether your training is high-quality, effective, and valuable, and helps you spot improvement opportunities or show impact.

Four common types of evaluation:

- **Formative:** Is this training feasible and appropriate for our learners and setting?
- **Process/Implementation:** Are we doing what we planned (delivery, reach, fidelity, supports on)?
- **Outcome:** Are we achieving the goals (knowledge, confidence, behavior) we set?
- **Impact:** Are we seeing the ultimate result we hoped for (bigger program or system change)?

How to Use this Worksheet

Use this worksheet to think through the problem you're solving, the lens you'll use (design for a decision, explain differences, or build ownership), the framework you'll choose to organize measures (levels or program), the systems/supports you need in place, and how you'll measure what you hope to achieve.

It's okay to brainstorm ideas you can't tackle yet. This is an iterative process. Capture them and come back later. You can keep working on this over time.

Next Steps

Share the worksheet with your team and start refining your plan. If you'd like help developing or implementing your evaluation plan, request a consultation with AdaptED Strategies by contacting us at our email or through LinkedIn.

Step 1. Thinking Through the Problem

A. What problem are we solving, for whom, and why now?

B. Who will use the findings and when?

C. Pick your lens (circle one): Design for a decision / Explain differences / Build ownership

- **Design for a decision** (utilization-focused): start with the decision & date; collect only what's needed to choose.
- **Explain differences** (realist): look at local conditions that help or hinder change.
- **Build ownership** (empowerment): teams set goals, track simple indicators, and improve.

D. Pick Your Framework (*Does 1 framework suit your needs, or do you need to merge several?*)

Step 2. Solution & Supports

What do we want to do solve the problem? *(What should we keep, remove or change for the next training session)*

A) What we will deliver next (training)

Write the pieces of the next run.

Format (online / in-person / hybrid): _____

Key learning activities (e.g., case practice, role-play, demo, job aid walk-through):

B) Delivery supports needed

Check what you need in place to develop and/or deliver the training

People: ☐ facilitator ☐ instructional designer ☐ subject-matter expert ☐ evaluator ☐ graphic designer ☐ tech support

Tools/space: ☐ online learning system (course site) ☐ webinar platform ☐ classroom ☐ projector/A-V ☐ breakout rooms ☐ sign-in/attendance

Materials: ☐ slides ☐ handouts/job aids ☐ practice scenarios ☐ polls/surveys ☐ feedback form ☐ certificate

Step 3. Change Target (*prioritize one*)

What, specifically, are we trying to change? (*check all that apply*)

☐ Knowledge/skill ☐ Confidence ☐ Intention ☐ On-the-job behavior ☐ Program/system outcome

Priority change (*one sentence*): _____

Step 4. Enablers (Context/On-the-job Supports)

What must be in place at work so people can use the skill after training? (*check and add*)

Examples to consider:

- **Time & tools:** *time on the schedule; supplies ready; access to systems; working equipment*
- **Prompts & guides:** *job aid/poster visible; system prompt or checklist; pocket card or template*
- **People & routines:** *supervisor reminder/cue; quick team huddle; peer/mentor check-in; observation with feedback*
- **Rules & space:** *approval/policy clarity; safe/quiet space; workflow steps agreed*

☐ Time to practice ☐ Materials ready ☐ Job aid or prompt visible ☐ System access ☐

Supervisor cue/feedback

☐ Team meeting/huddle time ☐ Clear approval/policy ☐ Space available ☐ Coaching/check-ins

☐ Other: _____

Top 2 gaps to fix first:

1) _____

2) _____

Step 5. Evidence Plan *(keep it minimal for now)*

Choose **one** from each row.

What to check	Your indicator	Source	How often
Process (are we doing what we planned?)	_____	Sign-in / checklist /	<input type="checkbox"/> daily <input type="checkbox"/> weekly <input type="checkbox"/> once
Readiness (are people ready to act?)	_____	1–3 item confidence or intention	<input type="checkbox"/> pre <input type="checkbox"/> post <input type="checkbox"/> 30d
Behavior (is it happening on the job?)	_____	Quick observation or small log sample	<input type="checkbox"/> weekly <input type="checkbox"/> monthly
Result (simple signal of value)	_____	Time / errors / incidents / client outcome	<input type="checkbox"/> 30d <input type="checkbox"/> 60d <input type="checkbox"/> 90d

Step 6. Use Plan

Now that you know what you'll do, what you need, and how you'll check progress, decide how you'll use the data. Write **2–3 simple “if–then” rules** so your next step is clear (e.g., *If our key step isn't happening by 30 days, then add a coaching session*).

If-then rules (write 2–3):

- If _____ is below target by _____, then we will _____.
- If _____ is on track by _____, then we will _____.
- If _____ is above target by _____, then we will _____.