Executive Summary

As with any training program, monitoring results and user feedback is critical to its success and effectiveness. The proposed sessions will be online events, on demand. Technical assistance will be available during the process, and feedback will be collected during and after the sessions. Before any session is available to the public, it will undergo a dry run with a team of experts, then a pilot with selected business owners. Comments will be solicited from each of these groups, formative and summative, and adjustments will be made accordingly prior to widespread release. Subsequently, results will be monitored monthly for the first year the sessions are available to the public. The exhibits included reflect the reasoning behind the summative evaluations and the resulting response from the project team, in addition to interaction from the stakeholders.

Evaluation Plan

Formative Evaluations

As the training is on demand and all online, the traditional methods will not be an option for formative evaluations. To mitigate the impact of forgoing live communication, online tools will be used to solicit comments about the session as well as the participants' takeaways in each section.

On the concluding slide of each section, the margin will include icons which, once selected, allow the user to post multiple types of feedback: comments about the usefulness of the course or the ease of use of the module, questions about the content or a note-to-self (a takeaway) that can be printed or sent to a specified mailbox at the conclusion of the course. If solely giving feedback, the user will be given the option of submitting anonymously, or including a name for a reply. The Questions icon will offer an option for a response by e-mail within 24 hours. Immediate help for navigation/content questions can be accessed by phone, using the 800#. Suggested icons and their respective legends are below.

Use this link to comment on flow and ease of use and usefulness. of the module.

(This will provide ideas for improvements and shed light on the user's experience regarding design.)

Use this link for any questions that concern content.

(This will provide useful detail regarding opportunities to improve content.)

Use this link to record takeaways. What do you want to keep for later use?

(This will show what, specifically, participants are retaining, and have found useful.)

The tools described above will provide information for future changes to the module that will either correct speed-bumps, enhance flow or improve the narrative. The comments made by users regarding takeaways will be particularly revealing, as they will highlight areas that work well. The methods and/or style in those areas will be reviewed to determine what factors make them more effective than others. These comments will also be useful in conversations with stakeholders* when addressing this series' benefits to them and the organization as a whole. The goal would be for the project team to meet monthly during the initial six months to discuss formative evaluation comments and suggestions, then to revise as indicated based on trends, not a single suggestion or comment. When and if changes are substantive, the stakeholders would be notified. This would not be necessary unless the direction of the project changed based on feedback, with the exception of times when significant resources would have to be tapped for revisions. It is noteworthy that these sessions will be on-demand, and would continue to be available while revisions are being considered. This is consistent with current protocol. We do not remove a product during development of a revision.

Just as entrepreneurs must provide business plan projections to venture capitalists, projections are made to stakeholders as to expected outcomes. The relationship midstream is similar as well. Financiers expect to be kept apprised of progress; likewise with stakeholders. Until the program is considered established (running for at least one year), periodic meetings or report-outs to stakeholders is the norm. Brief meetings would be held on a monthly basis for the purpose of providing metrics - participant completions, number and type of comments, whether formative or summative - as well as an update on suggested revisions, if any, and potential timelines for completion.

**These would consist of the Project sponsors, Learning Services team, Regional executive leadership, Marketing and Distribution employees and agency partners.*

Summative evaluations

At the conclusion of the module, the participant will have options. The first is whether to have the takeaway notes printed or e-mailed. The second would be either taking the survey or receiving the survey link electronically the following business day.

Questions **Responses correspond to 1-5 scaling**	**Useful because**
Which of the following industries best describes your operation's market segment: Industrial, Office, Retail, Service, Contracting, Institutional (drop-down feature to respond)	It sets context for balance of responses.
The material is easily relatable to your business property.	Using first question, response on this one can reveal examples that aren't resonating with users.

Questions Responses correspond to 1-5 scaling	Useful because
The material was easy to follow and understand.	Reflects whether the content needs to be more basic.
The Knowledge Checks effectively reinforced the narrative that preceded them.	These might need review to confirm they both correspond to objectives and meet users where they are.
The design and format of the module facilitated comfortable viewing.	Colors and fonts may require tweaking.
The comment, question and takeaway tools met functional expectations.	If there are problems, they must be located and resolved.
This module has prepared me to make more informed decisions about my insurance needs.	Multiple negative responses would indicate the need for a major overhaul.
This experience persuades me of the need for additional training in other lines of business.	Encourages or discourages development of additional modules.
I would be likely to recommend this module to other business owners.	This suggests we're on the right track, overall.

The survey provides numerical feed-back (scale of 1-5) to facilitate scoring. These will assess the degree of effectiveness in each area, and will enable the project team to quickly target weak areas. The scoring follows these descriptions:

- 1 - Not at all
- 2 - To a limited extent
- 3 - To a Moderate Extent
- 4 - To a considerable extent
- 5 - To a great extent

The comments sections that are included after each question will facilitate the user's ability to be specific with reasoning behind the scoring selections, or to simply allow space for free-form comments that they didn't think of until the survey prompted additional thoughts. As with formative responses, the project team will review monthly to determine scoring in category. All scores should average higher than 3.5 for a successful outcome. The results can be sorted by industry type to more effectively determine which particular type of business owners are not relating as well to the material as others. Applicants who have chosen to include their names can be contacted for additional clarification on issues. Additionally, the Survey Monkey evaluations will include a customized Thank You for your feedback, as well as an option to leave an e-mail address for follow up.

What comes before

The nature of this training creates a challenge in securing narrative feed-back. Further, since this is a new program, a dry run that involves only company employees is in order. This will serve to validate flow as well as to confirm system tools are functional and user friendly. No fewer than 12 users would be targeted for the dry run (field test – or during development summative evaluation), and each of them would be asked to complete a summative evaluation. This initial survey will be different from the one users will be provided once the module is available to the public. The test group is knowledgeable about insurance, and will be used more to test the functionality and flow than for any other reason. The group will be specifically requested to identify Level 1 items as well. These equate to typos, grammatical errors and misspelled words.

Dry Run Questions Responses correspond to 1-5 scaling	**Useful because**
The material covered adequately addresses major provisions in the CP 00 10. *If provisions should be added, so note item and justification.* If scoring is 3 or lower, please comment as to cause.	If there are provisions that need to be added, the project group must revisit topics included.
The flow of information was logical and easy to follow. *Note whether additional examples should be provided in each section. Specifically comment on whether transitions between provisions and topics needs work to appear seamless. Include detail as to location in material.* If scoring is 3 or lower, please comment as to cause.	Effective flow must be established by those who understand the topic before this module is released to the public.
The material effectively addressed stated objectives. *Consider and note whether any objectives could be better or more easily met by amending narrative or using different examples. Provide specific suggestions.* If scoring is 3 or lower, please comment as to cause.	People in the industry and who are not among the SMEs or IDs are better able to assess this area, and can provide constructive feedback for improvements.
The Knowledge Checks effectively reinforced the narrative that preceded them. *Consider whether the knowledge checks might be too easy or so difficult the participant might lose interest.* If scoring is 3 or lower, please comment as to cause.	These might need review to confirm they both correspond to objectives and meet users where they are.
The design and format of the module facilitated comfortable viewing. *If there are issues, please advise specifics - is the issue contrast? Brightness? Something else?* If scoring is 3 or lower, please comment as to cause.	Colors and fonts may require tweaking.
The comment, question and takeaway tools met functional expectations. *Note if any link didn't work or if its intent was not easily understood. Advise specific location within material.* If scoring is 3 or lower, please comment as to cause.	If there are problems, they must be located and resolved.

The second piece is a pilot for business owners, all of whom are to be solicited by our agency partners. They will have the benefit of using a product that should be highly functional and effective, as it will have already been vetted by the dry-run participants. Each of them will also be asked to complete a summative evaluation that is identical to the version which will be used by participants when the module is publicly available.