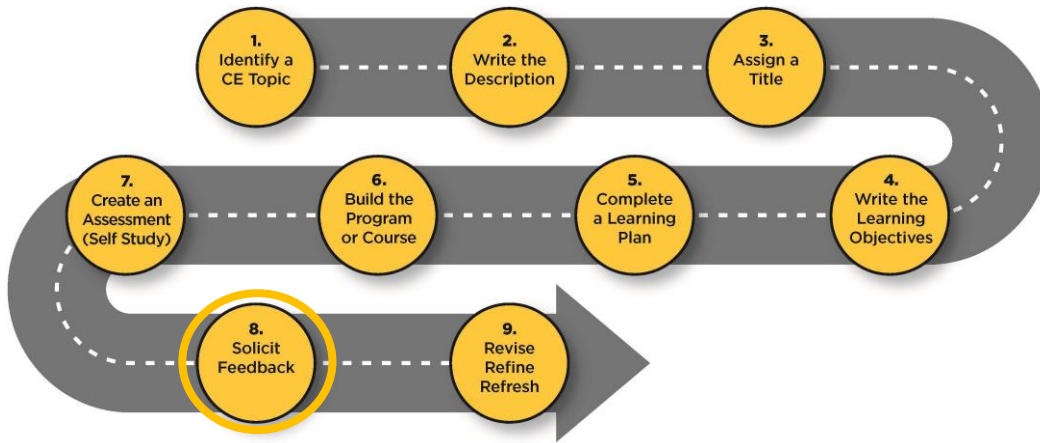


## GUIDANCE DOCUMENT: DESIGNING A PROGRAM EVALUATION

The CFP Board Council on Education has developed a set of CE Quality Standards for various steps of the program development process. **Designing a Program Evaluation** to solicit feedback from participants is an important step in the process. This feedback will provide valuable information about content and delivery satisfaction and be the basis for making any adjustments in future presentations.



### Keep It Short; Keep It Simple

A properly designed program evaluation should take no more than three minutes to complete and require minimal thinking time or writing. Here are a few tricks to ensure both:

- Pre-populate program title, date, and instructor name
- Have participants respond to short *positive* statements or questions
- Ensure statements and questions are clearly relevant to their experience. ‘*What’s In It for Me?*’ (WIIFM)
- Don’t bother asking questions about things you cannot control or already know the answer to (e.g. room size or set-up, room temperature, quality of refreshments)
- Minimize the use of open-ended questions that require writing out a response
- Provide response options with the ability to add “Other” when asking for an opinion

### Build Your Evaluation

To keep your evaluation short and simple, consider incorporating 5-7 statements using a Likert Scale to measure response. Add 2-3 easy-to-answer questions at the end. Begin building following these 3 steps:

**Step 1:** Select your level of measurement – do you want to:

Assess Agreement	Rate Satisfaction	Assign a Point Value
Strongly Agree	Very Satisfied	5
Agree	Satisfied	4
Neither Agree nor Disagree	Neutral	3
Disagree	Dissatisfied	2
Strongly Disagree	Very Dissatisfied	1

**Step 2:** Add 6-8 statements (here are some examples):

Program Design & Delivery:	The program prepared me to meet the learning objectives
	Content was well organized and presented
	Content was relevant and will be helpful in my daily work
	The amount of content shared was just enough for me to absorb
	The activities incorporated into the program will help me apply what I've learned
	The program was conducted at a good pace
	The resources (handouts) provided will be extremely helpful
	The length of the program was just right to adequately cover the content
	Overall, I'd rate this program Good to Excellent
Live Programs:	The instructor was knowledgeable
	The instructor was organized and prepared
	The instructor did a good job managing time and pace
	The instructor was able to adequately respond to questions
	The instructor kept me engaged
	There was high quality interaction between the instructor and participants
Personal Benefit:	I will use what I learned today to better serve my clients
	This content is relevant to my job
	The program lived up to my expectations

**Step 3:** Add a few additional questions (here are some examples):

- Were all of your questions answered? Yes or No  
If No, what question(s) did you not have a chance to ask?
- Which part of the program did you find the most valuable? (Check all that apply)
 

<input type="checkbox"/> Group discussion	<input type="checkbox"/> Group activities
<input type="checkbox"/> Case Studies	<input type="checkbox"/> Use of relevant examples
<input type="checkbox"/> Other _____	
- How many stars would you give this program? ☆☆☆☆☆
- Which topics would you like to see addressed in future programs? (Rank your top 3 preferences)  
[Provide a checklist of 4-7 topics for participants to choose from; end by adding Other:]
- Additional comments or feedback (open-ended question)

### Additional Guidance Documents:

- Writing Meaningful Learning Objectives
- Levels of Complexity (Defined)
- Developing a Learning Plan
- Creating Effective Assessment Questions
- Sample Program Assessment
- [Building a Quality Live Program](#)
- [Building a Quality Online Course](#)

Comments or Questions? Please email us at [cesponsor@cfpboard.org](mailto:cesponsor@cfpboard.org)