



13.1 | Evaluation: Implementation Checklist

Table 13.5: A STREAMLINED CHECKLIST FOR IMPLEMENTATION

GENERAL QUESTIONS ABOUT IMPLEMENTATION:

- ☐ Who will develop the instruction, and what programs and resources will they use for production?
- ☐ How will the instruction be deployed (logistics, delivery platform/mode, time zones, scheduling, etc.)?
- ☐ Who will test the prototypes, participate in the pilot test, and review the content?
- ☐ How will the instruction be announced, marketed, and/or promoted for adoption? (if applicable)
- ☐ Are implementation or training guidelines needed by instructors, facilitators, or LMS administrators? Are orientation materials required for participants?
- ☐ What technical and instructional supports will be provided for those delivering and/or taking the instruction? How and with whom will participants communicate when they need help?

PROJECT MANAGEMENT & PERSONNEL REQUIREMENTS:

- ☐ What key milestones and deadlines should be included on the project schedule?
- ☐ Is time built in to allow for multiple rounds of prototype reviews, testing, and revisions?
- ☐ What dependencies could affect the timeline?
- ☐ How will progress and accountability be tracked?
- ☐ What quality standards should be applied and when?
- ☐ What risks should be anticipated, including technical issues, stakeholder delays, and scope creep?
- ☐ How will variances be handled?
- ☐ How will decisions be documented?
- ☐ What version control and review feedback will be recorded?
- ☐ What project management tools or platform will be used?
- ☐ Do the project management tools integrate with other systems used?
- ☐ Who has access to and/or can receive notifications from the project management system?
- ☐ Can the system generate progress reports or provide status dashboards?
- ☐ How and where will the final files, assets, and documentation be stored, and for how long?
- ☐ How, when, and by whom will the instruction be maintained? (updates, major revisions, link checks) Is the maintenance effort required reasonable for the anticipated “shelf-life” of the instruction?
- ☐ List the personnel and time required for development and implementation:

IMPLEMENTATION LOGISTICS:

- ☐ Check any of the following elements that apply to this project:
- ☐ Class roster for face-to-face implementation or attendance trackers for virtual implementation;
- ☐ Schedule internal or external guest speakers;
- ☐ Test online connections for learners and any guest speakers;
- ☐ Supply meeting links, passwords, and equipment for synchronous online sessions;
- ☐ Ensure materials are accessible for online instruction;
- ☐ For face-to-face training: facilities scheduling, locations for field trips and activities, meals or identification of local eateries, hotel or housing arrangements, travel arrangements (participants and/or support personnel);
- ☐ Procure equipment for presentation, instruction, scenario exercises, and spare components for key equipment;
- ☐ Obtain sufficient consumables (e.g. instructional aids, paper and pens, workbooks, handouts), specialized equipment (gloves, syringes, safety goggles), and single-use items (lab kits, wipes, and disposable technology covers like headphone covers);
- ☐ Job aids and other reference materials and training aids for instruction;
- ☐ Scheduling pre/post assessments, evaluations and critiques, pilot tests, reviews, and other feedback.
- ☐ Post-implementation debrief to review evaluation results, lessons learned, adequacy of training, and issues.