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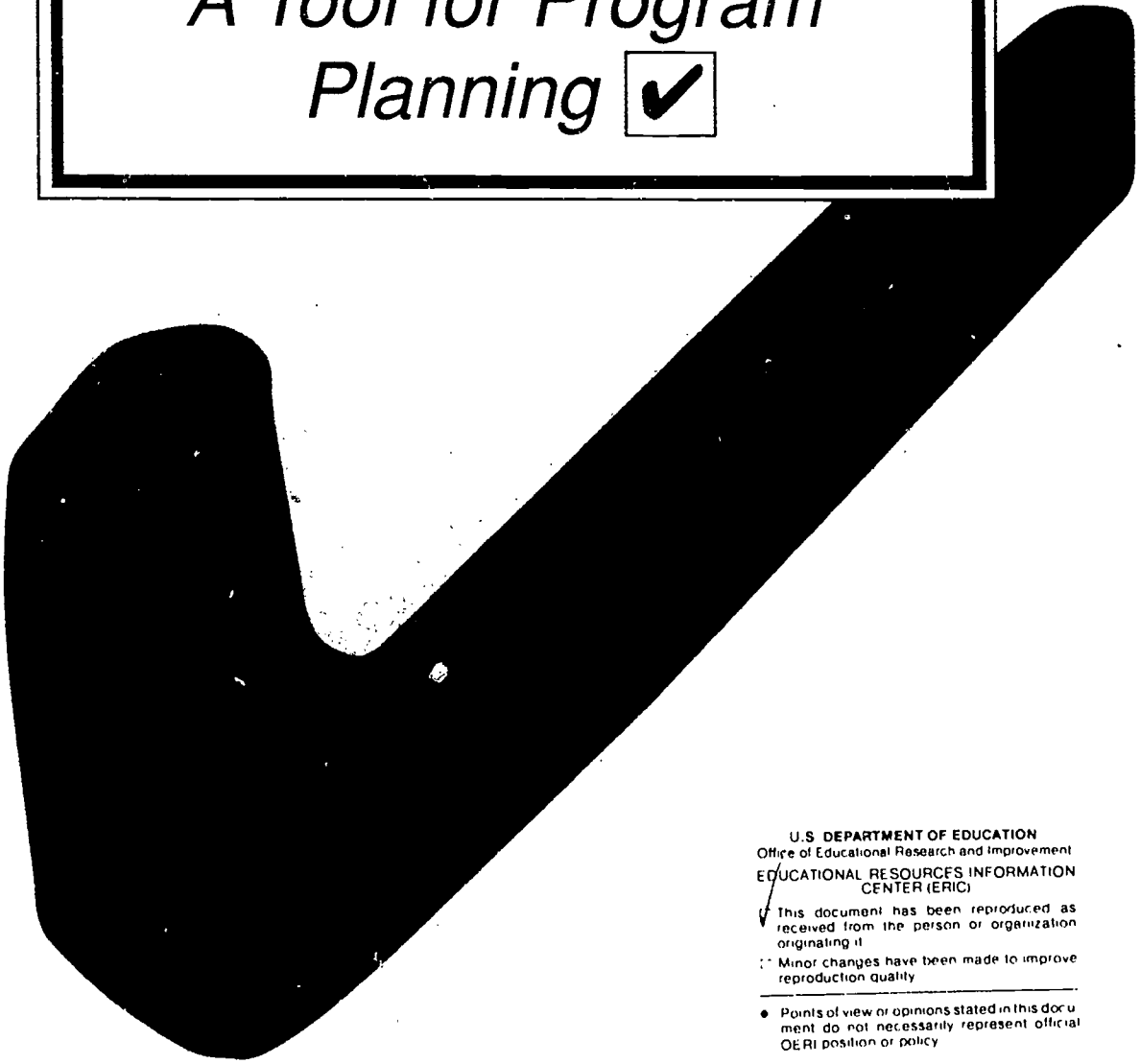
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ABSTRACT
        This checklist was designed to be used in developing
new workplace education initiatives and enhancing established
programs. The checklist is organized in four sections that cover the
following topics: (1) program design and administration indicators;
(2) participant achievement indicators; (3) program outcome
indicators; and (4) evaluation tools. The checklist also contains a
list of key terms with definitions as well as two related resources.
(KC)

Workplace Education Design Checklist: A Tool for Program Planning ✔

Workplace Education Design Checklist: A Tool for Program Planning ✔

January, 1994

Author

Donna Manly

The *Workplace Education Design Checklist: A Tool for Program Planning* was authored by Donna Manly (Center on Education and Work, University of Wisconsin - Madison) based on the extensive dialogue and work of the Program Evaluation Committee for the Wisconsin Workplace Partnership Training Program.

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4

The *Workplace Education Design Checklist: A Tool for Program Planning* is an aid for developing new workplace education initiatives and enhancing established programs. With minor modifications, this document also may be useful to other types of training and education endeavors.

For those planning to implement a workplace education program, this checklist may be used to determine the nature of recommended program components (Section 1), program effectiveness measures (Sections 2 and 3), and tools for use in the evaluation process (Section 4). For those involved in an active workplace education program, this checklist may be used to establish benchmarks and explore enhancements to the existing program components and evaluation design.

Checklist Uses
☑ As a Workplace Education Program Design and Planning Tool
☑ As an Evaluation Design and Planning Instrument
☑ As a Management-Labor-Education Partnership Decision-Making Tool
☑ As an Action Plan for Future Program or Evaluation Enhancements

It is suggested that each workplace education management-labor-education partnership complete this checklist as a team. As components, measures and tools are selected for use, partners may simply check the box before each item or enter a number designating its priority for implementation or improvement.

To aid in referencing checklist items during partnership discussions, the items are numbered sequentially within each of the four sections of this document. The number appears within parentheses to the right of each item. For easy reference to subsection items, the range of numbers within each subsection is identified on the Table of Contents (page iii).

After using this checklist to design or enhance workplace education programs, it is recommended that within six months to one year, partners examine their programs relative to the items selected for action on this checklist. To aid partnerships in this evaluation activity, a companion document, the *Workplace Education Evaluation Checklist: A Tool for Assessing and Improving Performance*, has been developed. For more information regarding the companion checklist, see the "Other Resources" section of this booklet on the following page.

Definition of Key Terms

Participants   Participants are employees who receive instruction or educational services through the workplace education program.

Partners   Partners are responsible for initiating and maintaining a workplace education program. Typically, workplace education partnerships involve at least one decision-maker representing the employer (a manager), the workforce (a labor leader, if it is a unionized workforce; or an employee representative, if the workforce is not unionized), and the education partner (e.g., the Technical College Workplace Education Coordinator, etc.).

Peer Advisors	In general, peer advisors are volunteers from all levels of the employer organization; often a majority are program participants. Peer advisors are committed to the success of the workplace education program and typically provide information to other employees one-on-one, assist with marketing and promotional activities, obtain employee input, and aid in furthering the program goals and objectives.
Stakeholders	Stakeholders are individuals with a vested interest in the success of the workplace education program. Most commonly, workplace education stakeholders include: management-labor-education partners, program participants, steering committee members, and peer advisors.
Steering Committees	Steering committees often are formed to guide the development and continuation of a workplace education program. Membership typically consists of one to three representatives from each of the partners as well as participants, peer advisors, and other representatives who are involved in or affected by the program (e.g., training, human resource and quality department staff, and supervisors).
Workplace Educational Skills Analysis	Workplace Educational Skills Analysis (WESA) is a process used to identify and analyze the basic educational skills required to satisfactorily perform a particular job or a cluster of jobs. Other similar processes include: job task analyses and literacy audits. The six stage WESA process is fully described in the *Workplace Educational Skills Analysis Training Guide*. For more information on the *WESA Training Guide*, see the "Other Resources" section below.

Other Resources

For more information on this checklist, the *Workplace Educational Skills Analysis Training Guide*, the *Workplace Education Evaluation Checklist: A Tool for Assessing and Improving Performance* or other workplace education publications, please complete and return the business reply card at the back of this booklet. Or you may call the toll free number at the Center on Education and Work, University of Wisconsin - Madison (1-800-446-0399).

Your experiences with this checklist are of interest to us. If the checklist aided you or if it can be enhanced to better meet your needs, please take a moment to let us hear from you. Simply complete the *Checklist Feedback* section on the business reply card at the back of this booklet and place it in the mail. Your comments will be extremely important in guiding and improving the development of future publications.

6

CONTENTS

7

Section 1

Program Design and
Administration Indicators

SECTION 1 -- PROGRAM DESIGN AND ADMINISTRATION INDICATORS

Below is a list of quality indicators for the design and administration of effective workplace education programs. Indicators are provided for the following recommended program components: program design and planning, education center development and maintenance, workplace educational skills analyses, curricula development, program support services, participant recruitment and program promotion, peer advising, instruction, participant assessment, professional development, and program evaluation.

Which of these indicators are appropriate to consider in designing your workplace education program?

■ PROGRAM DESIGN AND PLANNING

Program design activities include:

❑ Forming a strong management-labor-education partnership. (1.001)

❑ Completing a comprehensive workplace education needs analysis with input from all levels of the organization. (1.002)

❑ Establishing a program steering committee with representation from each partner, participants, peer advisors, and other stakeholders. (1.003)

❑ Clearly identifying partner and committee member responsibilities and including these and other program expectations in an agreement signed by all partners. (1.004)

❑ Developing clearly defined program goals and objectives which address continuous program improvement. (1.005)

❑ Identifying decision items such as the nature of participation (voluntary and released or compensated time, etc.) and participant recognition (e.g., bonuses and certificates). (1.006)

❑ Developing program policies which incorporate the input of all stakeholders, are non-discriminatory, and meet all other legal, contractual, and program-related requirements. (1.007)

❑ Selecting highly qualified instructional staff who best meet the needs of the worksite and the program. (1.008)

❑ Developing a written implementation plan based on the needs analysis, including resource allocations, realistic timelines, priority actions for all program components, and evaluation criteria. (1.009)

❑ Identifying committed employees to volunteer as peer advisors. (1.010)

❑ Other (1.011):

On-going program planning activities:

❑ Are driven by a strong, long-term management-labor-education partnership. (1.012)

❑ Are implemented by an active program steering committee empowered to guide the program. (1.013)

❑ Include regularly scheduled meetings in which decisions are reached through a consensus of all partners. (1.014)

❑ Are based on clearly defined goals and objectives established for the program. (1.015)

❑ Are responsive to evolving stakeholder needs. (1.016)

❑ Integrate program activities with other relevant workplace or partner-sponsored initiatives such as technical training. (1.017)

❑ Other (1.018):

■ EDUCATION CENTER DEVELOPMENT AND MAINTENANCE

Education center development activities include:

❑ Locating space for an education center which is on-site, convenient for employees, and meets local, state, and federal standards (e.g., Americans with Disabilities Act). (1.019)

❑ Designing individual and group learning facilities within the education center. (1.020)

❑ Creating an environment to enhance learning (e.g., quiet, comfortable, and accommodates multiple instructional approaches and participant learning styles). (1.021)

❑ Acquiring sufficient and appropriate equipment, furniture, and instructional materials for program initiation. (1.022)

❑ Other (1.023):

Education center maintenance activities:

❑ Ensure sufficient and appropriate equipment, furniture, and instructional materials. (1.024)

❑ Foster an environment which encourages learning. (1.025)

❑ Other (1.026):

■ WORKPLACE EDUCATIONAL SKILLS ANALYSES

Workplace Educational Skills Analyses:

❑ Involve all stakeholders in the design and implementation stages. (1.027)

❑ Are conducted efficiently and effectively. (1.028)

❑ Produce data and reports which are reviewed and updated as necessary to ensure continuing value to stakeholders. (1.029)

❑ Other (1.030):

Workplace Educational Skills Analyses are used to:

❑ Design individualized education plans for participants and aid with career planning. (1.031)

☐ Develop workplace and job-specific curricula. (1.032)

☐ Create appropriate assessment measures. (1.033)

☐ Incorporate workplace materials in instruction. (1.034)

☐ Other (1.035):

■ CURRICULA DEVELOPMENT
Curricula development processes and products:

☐ Include input and feedback from all stakeholders and address evolving stakeholder needs. (1.036)

☐ Are based on Workplace Educational Skills Analyses and linked with skills and competencies validated through national and state studies. (1.037)

☐ Are pilot-tested. (1.038)

☐ Use appropriate workplace, job-related, basic, and life skills materials to promote contextual learning and improve job performance. (1.039)

☐ Are bias free, culturally relevant, and appropriate to the population. (1.040)

☐ Other (1.041):

■ PROGRAM SUPPORT SERVICES
Support services:

☐ Include child care, educational counseling, and other employee assistance programs necessary to effectively minimize barriers to program participation for all employees regardless of work shift. (1.042)

☐ Are based on continuing assessments of workforce needs for support services. (1.043)

☐ Are cost-effective and administered efficiently and uniformly. (1.044)

☐ Are effectively promoted with potential and current program participants. (1.045)

☐ Other (1.046):

■ PARTICIPANT RECRUITMENT AND PROGRAM PROMOTION
Participant recruitment activities:

☐ Are innovative and ongoing. (1.047)

☐ Reach target audiences with accurate information which motivates employees to initiate or continue program participation. (1.048)

☐ Are based on previously effective activities used in the program and in other workplace education initiatives. (1.049)

☐ Involve multi-media approaches including print, video, computer, and one-on-one verbal communications. (1.050)

☐ Are driven by stakeholder needs and suggestions. (1.051)

☐ Involve on-going local partner and peer advisor initiatives. (1.052)

☐ Other (1.053):

Program promotional activities:

☐ Are varied and conducted on a regular basis. (1.054)

☐ Orient, update, and maintain support from all levels of the partnership organizations. (1.055)

☐ Include opportunities for participant family members to become familiar with the program (e.g., education center open houses and newsletters). (1.056)

☐ Involve all stakeholders in planning and implementation. (1.057)

☐ Include sharing information with others interested in initiating workplace education programs. (1.058)

☐ Other (1.059):

■ PEER ADVISING

Peer advisor activities:

☐ Are continuous and based on program needs, goals, and objectives. (1.060)

☐ Aid in the development and furtherance of the workplace education program. (1.061)

☐ Involve one-on-one communications with all employees. (1.062)

☐ Utilize identified best practices. (1.063)

☐ Provide accurate program information and encourage employee participation. (1.064)

☐ Other (1.065):

■ INSTRUCTION

Instructional activities:

☐ Are age appropriate and driven by stakeholder needs and individualized education plans developed for program participants. (1.066)

☐ Respect the diverse educational, work, and cultural backgrounds of participants. (1.067)

☐ Are delivered in structured (e.g., mini courses) and more flexible (e.g., open entry/exit) environments, as appropriate. (1.068)

☐ Include multiple training methods to address individual learning styles (self-paced, one-on-one, formal and informal group-based, computer-assisted, video-based, etc.). (1.069)

☐ Are offered at convenient times for employees. (1.070)

☐ Use workplace, job-related, basic, and life skills materials to promote contextual learning and improve job performance. (1.071)

☐ Are presented in an interesting and meaningful manner and facilitate learning increasingly more complex and varied material. (1.072)

☐ Other (1.073):

■ PARTICIPANT ASSESSMENT

Participant assessment activities:

☐ Are explained in advance to participants and are undertaken to motivate and record learner progress. (1.074)

☐ Involve initial, interim, and post-instruction assessments that are appropriate and sufficiently sensitive to measure real change over time. (1.075)

☐ Are linked to individualized education plans, Workplace Educational Skills Analyses, and instructional content. (1.076)

☐ Involve formal and informal assessment methods such as performance-based, self, portfolio, alternative, standardized, and instructor-developed. (1.077)

☐ Are not used for purposes other than education and training. (1.078)

☐ Protect the confidentiality of participant assessment data. (1.079)

☐ Include feedback from more than one source (e.g., participant, employer, co-worker, supervisor, and instructor). (1.080)

☐ Other (1.081):

■ PROFESSIONAL DEVELOPMENT

Professional development activities:

☐ Address identified stakeholder needs and involve practice and systematic follow-up activities. (1.082)

☐ Are supported by sufficient resources (e.g., time, money, and access). (1.083)

☐ Other (1.084):

13

Professional development activities include:

☐ Orientation and training sessions for education partners and instructors on industry and organizational initiatives; and for private sector partners on available educational services. (1.085)

☐ Initial and on-going orientation and training opportunities for peer advisors and other stakeholders relative to program responsibilities, components, and services. (1.086)

☐ In-depth instructor training specific to workplace education (e.g., functional context curriculum development and competency-based assessment design). (1.087)

☐ Other (1.088):

■ PROGRAM EVALUATION

Program evaluation processes:

☐ Obtain on-going input and feedback on the program from all stakeholders, particularly participants. (1.089)

☐ Are sensitive to evolving stakeholder needs and are designed to improve the program. (1.090)

☐ Address informational needs for future program decisions and desired evaluation products without collecting unnecessary data. (1.091)

☐ Permit comparisons with other training programs and replication at multiple worksites, when applicable. (1.092)

☐ Are realistic and efficient. (1.093)

☐ Comply with all applicable legal and contractual requirements (e.g., Affirmative Action and Equal Employment Opportunity laws and collective bargaining agreements). (1.094)

☐ Protect the confidentiality of those participating in the program and in the evaluation process. (1.095)

☐ Protect the proprietary interests of the employer. (1.096)

☐ Are conducted by both the program steering committee and independent parties not directly involved with the program. (1.097)

☐ Provide for longitudinal data collection and analysis. (1.098)

☐ Are designed to yield qualitative and quantitative data. (1.099)

☐ Involve the data collection efforts of all stakeholders. (1.100)

☐ Incorporate input and feedback from all stakeholders on the evaluation design and implementation activities. (1.101)

☐ Other (1.102):

14

Program evaluation products:

☐ Include analyses of program components relative to effectiveness, efficiency, use of human and other resources, best practices, and continuous improvement efforts. (1.103)

☐ Assess the linkages between the workplace education program and the worksite and suggest means of strengthening those linkages in the short and long term. (1.104)

☐ Include findings properly attributed to the program. (1.105)

☐ Provide accurate and objective data documented in a manner usable by all stakeholders. (1.106)

☐ Include analyses of participant demographics with comparisons to the total workforce and intended target groups. (1.107)

☐ Other (1.108):

15

Section 2

Participant Achievement Indicators

SECTION 2 -- PARTICIPANT ACHIEVEMENT INDICATORS

Common indicators of achievement by participants in workplace education programs are listed below. Would it be appropriate to evaluate, as a result of participation in your workplace education program, whether *participants* accomplish the following?

■ MEET EDUCATION OR TRAINING NEEDS

    ☐ Enroll in other educational programs such as those sponsored by employers, technical colleges, universities, or other colleges (2.001)

    ☐ Achieve short-term goals they set for themselves (2.002)

    ☐ Meet long-term training and personal needs they identify (2.003)

    ☐ Indicate that program participation was beneficial to them (2.004)

    ☐ Other (2.005):

■ MASTER PROGRAM CONTENT

    ☐ Demonstrate greater success in more advanced or other job-related training programs (2.006)

    ☐ Improve their interpersonal, communication, and teamwork skills (2.007)

    ☐ Become qualified for promotions or transfers to preferred jobs (2.008)

    ☐ Become qualified to retain a job which has been restructured or for which new performance standards have been created (2.009)

    ☐ Apply for internal or external positions for which they would not have applied prior to program participation (2.010)

    ☐ Show collective academic gains in workplace basic skills (2.011)

    ☐ Obtain General Equivalency Diplomas (GEDs) or other education, training, or skill mastery certificates (2.012)

    ☐ Other (2.013):

■ IMPROVE JOB PERFORMANCE

    ☐ Improve their performance on the job (2.014)

    ☐ Demonstrate improved work habits such as being punctual, increasing attendance, and meeting deadlines with greater consistency (2.015)

    ☐ Improve their effectiveness in dealing with the current work situation (2.016)

    ☐ Other (2.017):

■ POSITIVELY AFFECT THE ORGANIZATION

    ☐ More effectively deal with technological, procedural, or other organizational changes (2.018)

    ☐ Improve dispute resolution through better communication (2.019)

    ☐ Increase their involvement in employee suggestion or quality improvement programs (2.020)

    ☐ Demonstrate collective attainment or improvement of job-related skills (2.021)

    ☐ Other (2.022):

■ MEET LONG-TERM PERSONAL, PROFESSIONAL, AND COMMUNITY NEEDS

    ☐ Demonstrate increased self-esteem and/or self-confidence (2.023)

    ☐ Apply training and/or education results to non-work situations (e.g., using employee benefits more appropriately) (2.024)

    ☐ Become better prepared to function as parents and community members (2.025)

    ☐ Become a role model to co-workers (2.026)

    ☐ Demonstrate increased knowledge of the community, the organization and its initiatives, and/or the job (2.027)

    ☐ Demonstrate an increased ability to learn (2.028)

    ☐ Other (2.029):

18

Section 3

Program Outcome Indicators

SECTION 3 -- PROGRAM OUTCOME INDICATORS

Common program outcome indicators for effective workplace education programs are listed below. To help determine the impact of the workplace education program within your workplace, would it be appropriate to evaluate whether the *program* results in the following?

■ **MEETS EDUCATION OR TRAINING NEEDS**

    ☐ Meets the established goals and needs of the organizations and stakeholders involved in the initiative (3.001)

    ☐ Meets the stated objectives of the program (3.002)

    ☐ Benefits all stakeholders involved in the program (3.003)

    ☐ Other (3.004):

■ **RESULTS IN MASTERY OF PROGRAM CONTENT**

    ☐ Increases workplace basic skills of employees (3.005)

    ☐ Results in less re-training and on-the-job basic skills training (3.006)

    ☐ Other (3.007):

■ **IMPROVES JOB PERFORMANCE**

    ☐ Increases productivity (3.008)

    ☐ Improves the quality of products manufactured or services provided (3.009)

    ☐ Reduces absenteeism, tardiness, and employee turnover (3.010)

    ☐ Other (3.011):

■ **POSITIVELY AFFECTS THE ORGANIZATION**

    ☐ Prepares employees to more effectively deal with technological, procedural, or other organizational changes within the workplace (3.012)

    ☐ Increases employee job satisfaction (3.013)

    ☐ Improves employee morale (3.014)

    ☐ Increases collaboration and cohesiveness within the workforce and among workplace education program partners (3.015)

    ☐ Is cost-effective (yields a positive return on investment, or produces tangible and intangible benefits which justify training costs, etc.) (3.016)

☐ Promotes other initiatives within the workplace such as continuous quality improvement activities, employee suggestion programs, and technical training (3.017)

☐ Enables higher level positions to be filled more frequently by promoting employees from within the organization, rather than recruiting persons employed outside the organization (3.018)

☐ Improves employee safety within the workplace (3.019)

☐ Other (3.020):

■ **MEETS LONG-TERM PERSONAL, PROFESSIONAL, AND COMMUNITY NEEDS**

☐ Increases employee job security (3.021)

☐ Promotes lifelong learning by employees (3.022)

☐ Increases employee self-esteem and/or self-confidence (3.023)

☐ Other (3.024):

Section 4

Evaluation Tools

SECTION 4 -- EVALUATION TOOLS

Below is a compilation of evaluation tools which have been used independently and in various combinations by successful workplace education programs. Within your workplace, which of the following tools would be most useful in collecting the data you identified in the preceding sections as appropriate for evaluating your workplace education program?

■ STAKEHOLDER INFORMATION

    ☐ Current participant surveys and/or feedback (4.001)

    ☐ Participant follow-up surveys (4.002)

    ☐ Workshop or course surveys of program participants (4.003)

    ☐ Surveys and/or feedback from employees who have not participated in the program (4.004)

    ☐ Surveys and/or feedback from former program participants (4.005)

    ☐ Instructor surveys and/or feedback (4.006)

    ☐ Surveys and/or feedback from participants' supervisors, managers, and/or co-workers (4.007)

    ☐ Peer advisor feedback and/or surveys (4.008)

    ☐ Local partner or program steering committee surveys and/or other feedback (4.009)

    ☐ Focus group surveys and\or feedback from various departments or shifts (4.010)

    ☐ Surveys and/or feedback from other appropriate sources (employee assistance, quality or suggestion programs, collective bargaining teams, training or human resource departments, etc.) (4.011)

    ☐ Organization-wide employee attitude surveys (4.012)

    ☐ Other (4.013):

■ PARTICIPANT ACHIEVEMENT DATA

    ☐ Completion of parts or all of the General Equivalency Diploma (GED) or other education, training, or skills mastery certificates by participants (4.014)

    ☐ Learner portfolios illustrating progress within the program (4.015)

    ☐ Instructor diary or log of participant accomplishments (4.016)

    ☐ Participant case studies (4.017)

    ☐ Self-esteem and/or self-concept survey results (4.018)

    ☐ Promotion and job transfer statistics (4.019)

☐ Results on academic assessments (e.g., standardized tests, learner portfolios, and instructor-developed competency-based assessments) (4.020)

☐ Results on job-related performance assessments (e.g., pre- and post-competency-based performance assessments, competency checklists, job simulation assessments, and on-the-job observations) (4.021)

☐ Results on "learning to learn" tests (4.022)

☐ Enrollment and success in other educational or training programs (4.023)

☐ Contributions to employee suggestion programs or other initiatives (4.024)

☐ Other (4.025):

■ WORKPLACE EDUCATION PROGRAM DATA

☐ Cost effectiveness data (4.026)

☐ Enrollment statistics for the program (4.027)

☐ Participation data such as hours spent in the program (4.028)

☐ Program retention and re-entry statistics (4.029)

☐ Statistics on program objectives versus accomplishments (4.030)

☐ Participant demographic data (4.031)

☐ General program data such as hours of instruction provided, new initiatives undertaken, and resources allocated (4.032)

☐ Workforce training needs surveys including program awareness and participation questions (4.033)

☐ Data included in project reports such as those submitted to external funding sources, executives, and other decision-makers (4.034)

☐ Other (4.035):

■ WORKPLACE DATA

☐ Work-related performance data (4.036)

☐ Scrap, waste, rework, or downtime statistics (4.037)

☐ Safety statistics (e.g., OSHA 2000 log and workers compensation claims) (4.038)

☐ Employee turnover statistics (4.039)

☐ On-the-job attendance statistics (4.040)

☐ Employee exit interview data (4.041)

☐ Salary and/or pay award data (4.042)

☐ Employee performance evaluation data (4.043)

24

☐ Customer satisfaction data (e.g., complaint, reject, or return statistics) (4.044)

☐ Production, quality, or error rate statistics (4.045)

☐ Training department data (less re-training, greater success in more advanced training programs, education incentive usage statistics, etc.) (4.046)

☐ Recruitment data for higher level positions (e.g., increased recruitment from within rather than outside the organization) (4.047)

☐ Job satisfaction statistics (4.048)

☐ Missed and/or realized business opportunity data (4.049)

☐ Control group data (4.050)

☐ Other (4.051):

25

To provide feedback regarding this checklist and for information on other workplace education publications available through the Center on Education and Work, University of Wisconsin - Madison, please take a few minutes to complete and return the business reply card below. Your feedback regarding this checklist will be extremely helpful in guiding and developing future publications.

You may also call the toll free number at the Center on Education and Work (1-800-446-0399), if you would like to:

☑ Request order forms for copies of the companion document, the *Workplace Education Evaluation Checklist: A Tool for Assessing and Improving Performance*, the *Workplace Educational Skills Analysis Training Guide*, or additional copies of the *Workplace Education Design Checklist: A Tool for Program Planning*.

☑ Provide additional feedback on this checklist.

☑ Request additional information or answers to specific questions.

Completed order forms may be faxed to the Center on Education and Work at 608-262-9197.

Thank you!

☑ **Checklist Feedback**

I used this checklist to:
(Check all that apply)
- ☐ Develop a workplace education program
- ☐ Design an evaluation plan for a workplace education program
- ☐ Prepare a funding proposal
- ☐ As a reference
- ☐ Other: _____

How useful was this checklist to you?
- ☐ Very Useful
- ☐ Somewhat Useful
- ☐ Not Useful

Any comments or suggestions to improve the usefulness of this document?

_____
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