

# CHECKLIST FOR FORMATTING CHECKLISTS

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The purpose of this checklist is to provide support for program evaluators and others who are responsible for the design, development, and use of evaluation checklists. Use this checklist after content design and prior to final development of an evaluation checklist. Assess the draft checklist against each criterion listed below, and make revisions as needed in order to best meet all criteria. This checklist is to be used in conjunction with the Checklists Development Checklist (available at <http://www.wmich.edu/evalctr/checklists/guidelines.htm>). Further guidelines regarding the design, development, and use of checklists for evaluation are available through The Evaluation Center (<http://www.wmich.edu/evalctr>).

## 1.0 CONTEXT

- 1.1 The title is on the first page.
- 1.2 The title accurately and adequately describes the purpose of the checklist.
- 1.3 A context is provided at the beginning of the checklist and specifies the following:
  - 1.3.1 The audience for the checklist
  - 1.3.2 When to use the checklist
  - 1.3.3 General directions for the checklist
  - 1.3.4 Tools/references that support the checklist
  - 1.3.5 Where to get help for using the checklist
  - 1.3.6 Developer and version date of the checklist

## 2.0 CONTENT

- 2.1 The checklist content is complete.  
(Content conveys all the necessary information to address the topic of the checklist.)
- 2.2 Content is technically correct.
- 2.3 Precise terms are used.  
(Precise terms are not open to wide interpretation, e.g., “three” is more precise than “several” and “weekly” is more precise than “periodically.”)
- 2.4 The checkpoints focus the user on what to do.
- 2.5 Precise verbs are used to delineate activities outlined in the checklist (e.g., “identify” is more precise than “write” and “write” is more precise than “communicate.”)
- 2.6 Language is used consistently.  
(The same word is used to refer to a particular concept throughout the document, rather than using synonyms; e.g., the term “precise” is used repeatedly, rather than “specific,” “definite,” or “strict.”)
- 2.7 Acronyms are spelled out on first reference.

- 2.8 Common words are used.  
(Words used in everyday language should make up the bulk of the document, because these words facilitate clear understanding for the greatest number of readers.)
- 2.9 Each item on the checklist includes only one activity.  
(This avoids confusion and keeps the user focused on one task to be completed at any given time.)
- 2.10 Examples are provided, if needed.  
(Examples are useful when there is only one correct way to complete the task, when a task can be visually depicted, and when verbal directions are vague despite best efforts to clarify them.)
- 2.11 Content is free of extraneous material, such as humor and attempts to motivate the user.  
(Humor and motivators only work during the first reading, and checklists are designed to be used in multiple applications.)
- 2.12 Items are clear. Items should be
  - 2.12.1 Succinct (use no more or no fewer words than needed to convey the point)
  - 2.12.2 Positive (identify what to do, rather than what not to do)
  - 2.12.3 Declarative (make statements as opposed to asking questions)
  - 2.12.4 Active voice (emphasize verbs rather than adverbs or adjectives)

### **3.0 STRUCTURE**

- 3.1 Similar and facilitating items are grouped together.  
(A facilitating item is one that helps the user complete another task; e.g., being able to save a document on a hard drive facilitates learning how to save a document on a floppy disk.)
- 3.2 The order in which items are presented is functional.
- 3.3 Items are numbered so users know the appropriate order in which to perform activities.  
(Even if there is not an inherent sequence to a task, creating one provides users with an orderly structure and enhances the likelihood of successful completion of the task.)
- 3.4 Visual breaks (white space/horizontal lines) are used to separate different items, sections, and ideas, making it clear where one element of a checklist ends and the next begins.
- 3.5 Important information is highlighted in some way (boxed, centered, capitalized) to capture the user's attention.
- 3.6 The word "not" is underlined when it is used (to draw attention to the negative).
- 3.7 Textual devices are used effectively to control the intake and flow of information. Specifically:
  - 3.7.1 The use of different type faces and/or type sizes creates a clear structure (hierarchy) for the document.
  - 3.7.2 Body text is configured so that it is easy to read.  
(A few strategies to facilitate ease of reading include using serif typefaces, justified left text, combined upper and lower case, and space between paragraphs.)
  - 3.7.3 If color is used, it serves a meaningful purpose.  
(Color will be of little use if the checklist is photocopied; so if used, color should be absolutely necessary.)

#### 4.0 IMAGES (If needed)

- 4.1 Images are presented on the left side of the document.  
(Users understand directions better when they see the concept first and then read the description, and in Western cultures our eyes move from the left to the right side of the page.)
- 4.2 Explanatory text is presented to the right of or directly below the image.
- 4.3 Images are oriented from the user's perspective.  
(Users should see the image from the angle they would see it in real life, not mirror image, upside down, or backward.)
- 4.4 Images serve an obvious purpose.  
(Images should directly contribute to users' understanding of the checklist content.)
- 4.5 Images contain only essential information.  
(Line drawings are generally better instructional devices than photographs because drawings eliminate extraneous information and help the user focus on important attributes of an element.)

#### 5.0 USABILITY

- 5.1 The draft checklist was tested to see if it worked as intended.  
(This requires that the developer has a clear sense of the goals and purposes for the checklist.)
- 5.2 The tryout was conducted with members of the target audience for the checklist.  
(Target audience members are the only people who can adequately judge whether the checklist is of value to them as they work to achieve the purpose for which the checklist is intended.)
- 5.3 The tryout was conducted with only one user at a time.  
(It is almost impossible to track more than one person at a time when documenting the user's experiences with and recommendations for the checklist.)
- 5.4 The tester refrained from providing help during the tryout.  
(It's easy to get caught up in wanting to help the user understand areas of confusion, but it's more important to concentrate on documenting these problems and having the user suggest improvements so that in the long term the checklist is a better product.)
- 5.5 Revisions were made to the checklist based on the results of the tryouts.
- 5.6 Tryouts continued until target users were able to use the checklists as intended.

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