Appendix Two:   
Instructional Design Tools

Here are assembled a collection of sample tools and products for each of the five phases of Instructional Design. These include things like sample needs analysis tools, design blueprints and prototypes, development templates, delivery techniques and checklists, and evaluation surveys. The digital version is available on the accompanying CD-ROM.

#### Listing of Design Tools

**Analysis Section**

1. Organizational Surveillance Worksheet 368
2. Job Task Analysis Observation Worksheet 369
3. Task Analysis Summary Report 375
4. Learning Styles Checklist 377
5. Context Analysis Checklist 380

**Design Section**

1. Objectives Matrix 382
2. Budget Template 383
3. Blueprint Template 384

**Development Section**

1. Training Manual Template 388
2. Test Specifications 390
3. Training Quality Control Checklist 396
4. Production Evaluation Checklist 398

**Implementation Section**

1. Lesson Plan Template 402
2. Training Delivery Techniques Matrix 404

**Evaluation Section**

1. Sample Participant Reaction Survey 406
2. Sample Supervisory Behavior Change Survey 409

17.[Training ROI Worksheet 413](#_Toc87087790)

## Tool One:

## Organizational Surveillance Worksheet

###### Directions:

Scan the areas listed below and determine how many of them are relevant to your organization and job. Where would you obtain current information about relevant areas? What’s the current state in your organization?

|  |  |  |
| --- | --- | --- |
| **Areas of Interest** | **Sources** | **Current State** |
| Strategic Plans |  |  |
| Business Objectives |  |  |
| Policies and Procedures |  |  |
| Performance Standards |  |  |
| Job Descriptions |  |  |
| Organization Charts |  |  |
| Annual Reports |  |  |
| Performance Appraisal Results |  |  |
| Key Performance Indicators |  |  |
| Cost of Quality |  |  |
| Turnover |  |  |
| Absenteeism |  |  |
| Disciplinary Actions and Trends |  |  |
| Accident Rates & Costs |  |  |
| Labor Costs |  |  |
| Scrap/Waste Costs |  |  |
| Rework Costs |  |  |
| Marketing Plans |  |  |
| Competitive Analysis |  |  |
| Industry Trends |  |  |
| Engineering/Technical Forecasts |  |  |
| Legal Issues and Mandates |  |  |
| Other? |  |  |

## Tool Two:

## Job Task Analysis Worksheet

###### Directions:

Use this instrument formally or informally, according to the ability and motivation of the group you are working with.

All questions should be answered by the employees who do the job.

Those employees should answer all questions in respect to their present job. For example, if they are now working as a welder but they worked as a crew assistant for years, they should still make their ratings only according to their present job as a welder.

## Interview Questions

1. What is your present job title?
2. How long have you held your present job title?
3. What department/division do you work in?
4. What are the major tasks of your job? (Use job description to verify)
5. How many people will be performing the tasks?
6. What is the time spent performing each task?
7. What is the time lag between training and performing the tasks?

*For the next series of questions, focus on each major task individually. Use the Task Rating Form to help capture this information.*

1. What are the consequences of performing the task inadequately?
2. What is the probability of deficient performance of this task?
3. What are the requirements of this task?

## \_\_\_\_\_ Memory -- recall, report, identify, restate, explain, look up

## \_\_\_\_\_ Divergent Thinking -- Create, forecast, invent, state all the things that ... What would happen if ... Decorate, Modify

## \_\_\_\_\_ Convergent Thinking -- deductive reasoning, problem solving, hypothesize, organize, decode, find the rule

## \_\_\_\_\_ Evaluation -- Check, compare.

1. What is the current skill level required?

1. What is the future skill level required?
2. Are there any sub tasks related to this one?

Capture important ones.

## Task Rating Survey

###### Directions:

On the following pages are a large number of task statements. For each task statement do the following:

1. Read each task statement and think about your job.
2. If you perform the task, rate the task according to *Importance* (both current and future). If you do not perform the task, put a zero in the boxes for that task.
3. Finish all task ratings on *Importance*.
4. Do the same for the Difficulty, Frequency and Physical Effort scales.

In the blank spaces at the end of the list of tasks, write in any tasks you perform that are not listed. Be sure to provide information on *Importance*, *Difficulty*, *Frequency* and *Physical Effort* for all tasks you write in.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Name of Job Task** | **Current importance:**  5 - Essential  4 - Important  3 - Moderately Important  2 - Less Important  1 - Minor | **Future importance:**  5 - Essential  4 - Important  3 - Moderately Important  2 - Less Important  1 - Minor | **Difficulty of the task:**  5 - Most Difficult  4 - Very Difficult  3 - Moderately difficult  2 - Relatively easy  1 - Easy | **Difficulty to learn:**  5 - Most Difficult  4 - Very Difficult  3 - Moderately difficult  2 - Relatively easy  1 - Easy | **Frequency:**  5 - Daily  4 - Weekly  3 - Monthly  2 - Occasionally  1 - Infrequently | **Physical effort:**  5 - Very high level  4 - High level  3 - Moderate level  2 - Low level  1 - Very low level |
| 1. [List Job Tasks Here.] |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

## Task Rankings

###### Directions:

Calculate the ratings for each task from the Ratings Survey by adding up the rows. List the top ten tasks here in rank order. Discuss with the client whether you should include lower rated tasks in the training.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

## Tool Three: Task Analysis Summary Report

**JOB/COURSE: FUNCTION/SECTION:**

**TASK/LESSON:**

**PREREQUISITES:**

**EQUIPMENT AND MATERIALS:**

**REASONS:**

**STANDARDS:**

**INITIATING EVENT:**

**STEPS**

**1.**

**2.**

**3.**

**4.**

**5.**

**6.**

**7.**

|  |  |
| --- | --- |
| **Concepts/Principles:** | **Examples:** |
|  |  |
|  |  |
|  |  |

## Tool Four: Learner Analysis Worksheet

### Learner Analysis for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Course

### Competencies

1. What is level of students' current knowledge and skills in subject area? Check one:

\_\_\_\_\_ None  
\_\_\_\_\_ Basic background  
\_\_\_\_\_ Intermediate  
\_\_\_\_\_ Advanced

2. What aptitudes have been demonstrated/tested prior to attending this course?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. What major misconceptions are new students likely to have regarding the subject matter area?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Attitudes

4. Are there topics toward which the students are likely to feel especially positive?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Are there topics toward which the students are likely to feel especially negative?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. Are there any preferences the students have in instructional format or media?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Language Skills

7. What is the language level of the students?

\_\_\_\_\_ English as a Second Language/functional illiterate  
\_\_\_\_\_ Native English up to high school  
\_\_\_\_\_ College educated  
\_\_\_\_\_ Specialized/technical vocabulary

8. What style of language is preferred?

\_\_\_\_\_ Colloquial/conversational  
\_\_\_\_\_ Formal

### Tool Skills

9. Are there any sensory-perceptual deficiencies that will require special attention?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

10. Are there any special skills students will bring to the course?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Motivation

11. To what extent do the students value the training they will receive from the course?

\_\_\_\_\_ Training is essential to obtaining the job.  
\_\_\_\_\_ Regard training as having little value to success on the job.  
\_\_\_\_\_ Regard training as having considerable value to success on the job.

12. To what extent are students confident in their ability to succeed in the training?

\_\_\_\_\_ They have little confidence in their ability to succeed in training.  
\_\_\_\_\_ They are confident in their ability to succeed in training.  
\_\_\_\_\_ They are overly confident in their ability to succeed in training.

### Complete the analysis

13. List any subgroups within the target population to be trained. Include the location of various groups and any logistical issues regarding demographics.

14. Identify how the subgroups are different. (For example different learning preferences, language skills, attitudes, competencies, etc.)

15. List recommendations on how the training should respond to these differences. (For example, have special modules for specific groups, have the entire group take the same modules.)

## Tool Five: Context Analysis Worksheet

### Context Analysis for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Course

1. What presentation equipment will be available?

\_\_\_\_\_ None  
\_\_\_\_\_ Flip Chart/White Board  
\_\_\_\_\_ Overhead projector  
\_\_\_\_\_ Video system with VCR  
\_\_\_\_\_ CBT workstation  
\_\_\_\_\_ Multimedia workstation (incl. videodisk and/or CD-ROM)

2. Will the course be offered to individuals or groups?

\_\_\_\_\_ Individuals only  
\_\_\_\_\_ Groups only  
\_\_\_\_\_ Individuals and groups

3. If groups, how large will they be?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Will we need to train the trainers? If so, how many? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_Yes  
\_\_\_\_\_No

5. What other resources are available to support training delivery?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. How frequently will the course be offered (per year)?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. How long can this course be?

8. How can learning from this course be reinforced once the course is completed?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9. Will the course be sold?

\_\_\_\_\_Yes  
\_\_\_\_\_No

10. Will people pay to come to the course?

\_\_\_\_\_Yes  
\_\_\_\_\_No

11. What secondary uses are there for the course?

**Complete the analysis**

12. Recommend the facilities to be used.

13. Recommend the equipment to be used.

14. Recommend how to modularize the course according to the needs of different groups with varying needs.

15. Recommend how frequently the course should be offered per year.

16. Recommend a course length.

17. Recommend a strategy for the transfer of training.

## Tool Six: Objectives Matrix

###### Directions:

Use this matrix to plan a course with multiple learning objectives. List the target behaviors in the columns across the top and the content topics next to the rows on the left. Place an X in boxes that represent a learning objective. Make sure you have at least one objective per content area.

**Content Topics Target Behaviors**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
| **1.** |  |  |  |  |  |
| **2.** |  |  |  |  |  |
| **3.** |  |  |  |  |  |
| **4.** |  |  |  |  |  |
| **5.** |  |  |  |  |  |
| **6.** |  |  |  |  |  |
| **7.** |  |  |  |  |  |
| **8.** |  |  |  |  |  |

## Tool Seven: Design Budget Template

###### Directions: Use this template to enter budgeted and actual costs for design projects. The formulas will automatically calculate totals.

|  |  |  |  |
| --- | --- | --- | --- |
| Project Name: |  |  | DATE: |
| Project No. |  |  |  |
|  |  |  |  |
| **Staff Costs** | **$/Hour** | **Budget ($)** | **Actual($)** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Total** |  | $ 0.00 | $ 0.00 |
|  |  |  |  |
| **Contract Labor** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Total** |  | $ 0.00 | $ 0.00 |
|  | **Unit Cost** |  |  |
| **Non-labor & Material Costs** |  |  |  |
| Graphics/Overheads |  |  |  |
| Instructor materials |  |  |  |
| Video production |  |  |  |
| Computer programming |  |  |  |
| Printing/reproduction |  |  |  |
| Student materials (consumables) |  |  |  |
| Other: |  |  |  |
| **Total** |  | $ 0.00 | $ 0.00 |
|  |  |  |  |
| Contingency (Percent: %) |  | $ 0.00 |  |
|  |  |  |  |
| **Total** |  | $ 0.00 | $ 0.00 |

## Tool Eight: Blueprint Template

###### Directions:

Using the data from the job task analysis, context analysis, learner analysis, and objectives matrix, complete the template by adding Content, Presentation, Media, Practice, Deliverables, Learning Activities, and Tests/Assessments.

### Blueprint for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Course

## Summary:

## Job Analysis Findings:

## Context Analysis Findings:

## Learner Analysis Findings:

## Description of the module/lesson/course:

## Time to complete:

## Terminal Performance Objectives:

## Enabling Objectives:

## 

## Prerequisites:

## 

## Content:

## Presentation Methods:

## Media:

## Practice Activities:

## Pre-work/Homework/Projects:

## Evaluation Plan:

## Tests/Assessments:

## Deliverables:

## Budget: Milestones:

## Tool Nine: Training Manual Template

###### Directions:

The following template may be used either as a participant workbook, a leader’s guide or a combination of both. If used as a leader’s guide, it can be set up so that instructor notes are on the right-hand page and the student material is on the facing left-hand page of a double-sided manual. If used only as a participant workbook, it may be printed single-sided.

|  |  |
| --- | --- |
| **Course Name** | **Module Name** |

Module #:  
Module Name

Time

\_\_\_\_ Days/Hours

Required Materials

References

Briefly review the following materials used in this module:

List the references to be used in the course.

Terminal Performance Objectives

OH1



List course objectives here.

Content Heading One

Content Heading Two

Topic One goes here.

Sub-topic One goes here.

|  |  |
| --- | --- |
| **© Date** | **p.1** |

## Tool Ten: Sample Test Specifications

## Purpose

The following test specifications are meant to provide uniform guidelines for the preparation of test items in all training programs which include testing. Two types of test specifications are included: paper and pencil (cognitive) tests and performance (psychomotor) tests. Cognitive tests are appropriate when evaluating the acquisition of new knowledge, attitudes or thinking skills. Psychomotor tests are appropriate for evaluating behaviors and physical skills.

The examples provided, from an introductory Field Service Representative (FSR) course of a power utility, may serve as a model for other courses.

### Cognitive Test Specifications

### General Description

After attending a training session and reading the accompanying course manual, trainees will answer questions about factual details by selecting the one response from a choice of four which correctly answers the question. The objective of this test is to identify facts which correctly answer questions based on the content of training classes.

### Sample Item

**Directions:** Read the text and question below. Then read the four possible answers and select the one choice which correctly answers the question, based on the content of the FSR training program you attended. Circle the letter of the correct answer.

**FSR GAS OFF TURN-ON PROCEDURE**

1. Arrival

A. Record arrival time.

B. Go to meter and record meter number and read

C. Verify whether meter is ON or OFF.

2. Shutdown

A. Follow FSR Shutdown Routine

B. Tell customer that you have to go outside to work on the meter and that you will return to light and adjust appliances.

1. According to the text, what is the second step in the gas off turn-on routine?

a. Record the meter number and read. [correct]

b. Verify whether the meter is ON or OFF. [contradicted]

c. Go to the meter and follow the FSR shutdown routine. [inaccurate]

d. Be polite and courteous to the customer. [unsupported]

### Stimulus Attributes

1. The questions will be taken directly from the course manual or other participant handout. When appropriate, the material will be reprinted in the stimulus.

2. The questions will cover content which is specified in the objectives of the course.

3. The questions will include one of the following interrogative words: who, what, when, where, why, how, how many, how much, etc. The questions posed must be directly answered by material in the course manual or handouts.

### Response Attributes

1. Trainees will be asked to circle the letter of one of four given response alternatives, or to mark the letter of the answer on a pre-printed answer sheet. The four choices will consist of one correct response and three distracters.

2. Distracters will be of four types:

a. **Irrelevant detail**: the distracter contains a detail from the course, but it is irrelevant to the question posed.

b. **Contradicted detail**: the distracter directly contradicts information stated in the instruction.

c. **Inaccurate detail**: the distracter inaccurately states a detail in the instruction. It may be inaccurate because of different scope (too broad or narrow), because a detail is omitted, or because incorrect information has been added to the detail.

d. **Unsupported detail**: the distracter makes a statement about information in the instruction which is not directly supported by details in the instruction. The statement, however, is neither irrelevant nor contradictory.

3. The three distracters for each question will be drawn from at least two of the types mentioned above.

4. The correct answer will include all information required to completely and accurately answer the question.

### Performance Test Specifications

### General Description

After attending a training session and reading the accompanying course manual, trainees will demonstrate their ability to perform specific job skills by completing a series of directed tasks under the observation of the instructor or qualified subject matter expert. The objective of this test is to demonstrate competent performance of specified job skills learned in training classes.

### Sample Item (from FSR Training Course)

Trainees will correctly disassemble and reassemble a Fisher S-102 regulator with the aid of a cross-sectional drawing and an FSR tool kit.

**Directions to Instructor:**

Provide each trainee with an assembled Fisher S-102 Regulator, a drawing of the regulator, and a standard FSR tool kit. Instruct the trainee to disassemble the parts of the regulator listed below in the stimulus attributes and then to reassemble these parts. Observe the trainees performing this task and rate their performance on the Performance Observation Checklist (attached). Tally the total score on the checklist and go over the results with the trainees.

### Stimulus Attributes

1. Each trainee will be provided with an assembled Fisher S-102 regulator, a cross-sectional drawing and an FSR tool kit.

2. Trainees will be instructed to perform the following tasks:

a. Disassemble flange union

b. Remove disc holder assembly

c. Remove stem guide

d. Remove closing cap

e. Remove adjusting screw and spring

f. Reassemble all the above parts

3. Trainees will be observed by the instructor or subject matter expert as they perform the six tasks above. They will receive no coaching or assistance while performing the tasks.

### Response Attributes

1. The instructor or designee will record whether the trainee performs each step successfully on a Performance Observation Checklist (attached).

2. Successful performance includes all of the following:

a. identifying the correct parts to remove

b. removing the correct part without damaging it or the unit

c. reassembling all the parts so that the unit is functional

Partial credit (1/2 point) may be awarded for successful completion of one of the steps above.

3. A passing score will be awarded to trainees who perform all six steps correctly. Trainees who fail to perform all six steps will receive additional instruction and be required to take the test again.

4. The following checklist will be used to record and score observations.

## Performance Observation Checklist

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ITEM** | **TASK** | **CORRECT  (1 POINT)** | **PARTIALLY CORRECT  (.5 POINT)** | **INCORRECT (0 POINTS)** |
| 1 | Disassemble flange union |  |  |  |
| 2 | Remove disc holder assembly |  |  |  |
| 3 | Remove stem guide |  |  |  |
| 4 | Remove closing cap |  |  |  |
| 5 | Remove adjusting screw and spring |  |  |  |
| 6 | Reassemble all parts |  |  |  |
| TOTAL SCORE |  |  |  |  |

The maximum score is 6. A passing score is 5 or more.

## Tool 11:

## Training Quality Control Technique Checklist

|  |  |  |
| --- | --- | --- |
| **Design Phase** | **Quality Control Technique** | **Reviewed and Approved By** |
| **Analysis** | 1. Create a reliable, valid assessment design. 2. Ensure reliable data collection and analysis. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Design** | 1. Ensure a creative training solution that solves the identified need. 2. Ensure that proposed training solution is feasible. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Development** | 1. Orient developers to the needs of the customer and the blueprint specifications. 2. Use a template to standardize training presentation. 3. Develop a prototype and review it for accuracy and fit. 4. Provide timely feedback about the quality of work. 5. Review work for consistency, accuracy and quality. 6. Ensure that needed changes are completed. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |  |
| --- | --- | --- |
| **Implementation** | 1. Conduct Train-the-Trainer. 2. Transition materials and course maintenance to Implementers. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Evaluation** | 1. Conduct a formal evaluation of the pilot. 2. Conduct a peer and expert review of course design and materials. 3. Conduct formal evaluation of reactions, learning, skill transfer and business results. 4. Use evaluation results to refine the training design process and to improve the quality of training. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Tool 12:

## Production Evaluation Checklist

|  |  |  |
| --- | --- | --- |
| **Production Media** | **Key Items to Check** | **Reviewed and Approved By** |
| **Print Materials** | **Copy editing**   1. Grammar, punctuation, spelling, language and usage are all correct. 2. Technical jargon and acronyms used appropriately. 3. Masters include all edits identified in earlier drafts. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | **Formatting**   1. Page layout is correct, including: margins, headers, footers, headlines, spacing, etc. 2. Page breaks are correct, and do not leave any widows or orphans. 3. Paragraph formatting is correct, including use of: fonts, paragraph styles, spacing, indentation, use of bullets, numbers, special characters, etc. 4. Tables, job aids and reference materials are formatted correctly and read clearly. | \_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |  |
| --- | --- | --- |
|  | **Graphics and Artwork**   1. Artwork is legible and clearly labeled. 2. Artwork is technically accurate, including use of call outs, labels and sources. 3. Graphics support the instructional message and do not detract from it. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Visual Materials** | **Content**   1. Overheads, slides, computer displays, flip charts, etc. convey a consistent, technically accurate message. 2. Visuals properly support the instructional intent of the program. 3. Visuals are clear and useful to learners. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | **Impact**   1. Visuals express their messages clearly and powerfully. 2. Visuals are pleasing to the eye. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |  |
| --- | --- | --- |
| **Video Production** | **Video**   1. Actors are chosen who reflect the roles they are to play. 2. The sets support the instructional intent. 3. All equipment, props and backgrounds used are technically accurate. 4. Video properly matches the script and storyboard. 5. Final video output gives proper emphasis to people and objects depicted. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | **Audio**   1. Actors have followed the script. No omissions or additions that affect the message. 2. All technical jargon and company names have been pronounced correctly. 3. Sound is clear and understandable on the type of speakers that learners will be using. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Computer & Multimedia Production** | **Screen Design**   1. Screen layout is suitable for the content and activities. 2. Screen look and feel is inviting and user-friendly. 3. Screens all use the same template. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |  |
| --- | --- | --- |
|  | **Interactivity and User Control**   1. Questions formats are appropriate for the content. 2. Questions evaluate learning or require application of knowledge/skill. 3. Learners can easily navigate through the course and choose entry/exit points. 4. The user interface is simple and familiar to learners. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_    \_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | **Feedback and Evaluation**   1. Learners receive frequent positive and corrective feedback. 2. Feedback is individualized depending on the learner’s responses. 3. Remediation is provided for all learner errors. 4. The program measures and tracks learning pre and post-instruction. 5. The learning management system records learner progress and prints relevant management reports. 6. An evaluation plan to measure skill transfer and results is implemented. | \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Tool 13: Lesson Plan Template

###### Directions:

###### The following template may be used to develop a lesson plan for an experienced instructor or for a designer who will also deliver training. The template may either be completed by hand or using a word processor, with a table format.

#### Program Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Lesson Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### Total Lesson Time \_\_\_\_\_\_\_\_\_\_\_\_\_

#### Lesson Objectives \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### Materials Needed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### Props Needed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

#### 

|  |  |  |  |
| --- | --- | --- | --- |
| **Time** | **Content Outline Points** | **Method/Materials** | **Trainee Activities** |
| :00 | [List key content outline points] | [List methods and materials to be used] | [Describe what trainees should be doing] |
|  |  |  |  |
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## Tool 14: Training Delivery Techniques Matrix

###### Directions:

###### The following matrix shows a variety of methods for learning, presentation and distribution of training, using both classroom and non-classroom delivery systems. Although some methods naturally compliment each other, it is possible to select a methodology from each column and assemble a training delivery solution.

|  |  |  |
| --- | --- | --- |
| **Learning Methods** | **Presentation Methods** | **Distribution Methods** |
| * Action Learning * Apprenticeship * Case Study * Demonstration * Discussion * Drill and Practice * Expert Panel * Game * Homework * Lecture * Mentoring * OJT * Project * Role Play * Self-Study * Simulation * Small Group Activity * Trial and Error | * 3D Modeling * Art/Illustration * Audio * Classroom Trainer * Computer (CBT) * Dialogue * E-mail * EPSS * Groupware * Interactive TV * Internet (IBT) * Job Aid * Learning Group * Multimedia (MMT) * Print * Tele/Videoconference * Television * Video * Virtual Reality | * Audiotape * Cable TV * CD-ROM * DVD (Digital Video) * Electronic Mail * Floppy Disk * Internet * Intranet * LAN/WAN * Laserdisc * Live Speech * Mail * MP3 Player * Satellite TV * Simulator/Tactile Gear * Telephone * Videotape * Voice Mail |

## Tool 15: Sample Participant Reaction Survey

###### The following opinion survey may be used to assess participant reactions to classroom or technology-based training programs.

### Training Evaluation

Course Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructor(s)/Learning System: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

###### Directions:

###### Please read each item carefully and place a check mark in the column which comes closest to how strongly you agree or disagree with the statement. Check only one column for each item. Write any comments or suggestions in the space provide on the reverse side of the form.

###### **Strongly Strongly Agree Agree Neither Disagree Disagree**

#### Course Administration

1. I was able to take this course when I needed it.
2. The facilities and equipment were favorable for learning.
3. I had the skill and knowledge required to take this course.

#### Course Content

1. I clearly understood the course objectives.
2. The course met all of its stated objectives.

#### Course Design

1. The way this course was delivered (classroom, computer, video, self-study, etc.) was an effective way to learn.
2. I had enough time to learn the subject matter presented.
3. Participant materials (manuals, workbooks, job aids, handouts, etc.)  
   were useful to me.

#### Course Instructor(s)/Presentation

1. The instructor(s) or presentation was well-organized and easy to follow.
2. The instructor(s)/presentation was knowledgeable about the content.
3. The instructor(s) created a positive learning atmosphere.
4. Overall, I was satisfied with the instructor/presentation.

#### Course Relevance

1. My knowledge and skills increased due to this course.
2. I can apply what I learned in this course on my job.
3. Overall, I think this course was a valuable investment of my time.

#### Overall Evaluation

1. What did you like best about the course?  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. What did you like least about the course?  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. What would you like to see added or deleted from the course?  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. What additional comments or suggestions do you have?  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
     
   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
     
   *Thank you for taking the time to complete this survey. Your opinions will help us improve the quality of training programs and measure their results.*

## Tool 16: Sample Supervisory Behavior Change Survey

###### Directions:

###### The following is an example of a post-training behavior change and skill transfer survey sent to learners’ supervisors three months after completion of training. The cover letter explains the purpose and procedures for completing the survey. The survey itself follows on the next page.

### Sample Cover Letter for Supervisor Survey

Dear [ Name]:

About three months ago, one or more of your staff attended [Name of Training Program]. The course taught your employee(s):

* [List terminal performance objectives]

The attached survey asks some questions about the behavior and skills you have observed since the training took place. The information you provide will help us measure how well newly-learned skills are being transferred to the workplace and how job performance improves as a result of training.

We are asking you to complete this because, as their supervisor, you are in the best position to observe and judge how well your employees are performing. Please answer the questions that follow as completely and accurately as you can. It should take you about 10-15 minutes to complete the survey.

Return the survey by [Deadline Date].

Thank you very much for your support of training. Let me know if you have any questions.

Sincerely,

[Training Manager]

### Training Behavior Change Survey

**Course: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Part One:**

1. How many of your employees attended this training? \_\_\_\_\_\_\_\_\_\_\_\_
2. How would you rate your overall satisfaction with the training your employees received?   
     
   Very Somewhat Neutral Somewhat Very  
   Satisfied Satisfied Dissatisfied Dissatisfied
3. What was your employees’ average personal productivity before they started training?  
    Very Better Than Average Worse Than Very  
    High Average Average Low
4. What is your employees’ average personal productivity now that they have completed training?  
    Very Better Than Average Worse Than Very  
    High Average Average Low

**Part Two:**

For each of the skills listed below, please estimate the following:

1. The current skill level of your employees (Very High to Very Low).
2. How often they use the skill (Always to Never).
3. How important the skill is for their jobs (Very Important to Very Unimportant).

Use the five point scale, with five being highest and one being lowest.

|  |  |  |  |
| --- | --- | --- | --- |
| **Skill Learned** | **Current Skill Level (5-1)**  5 = Very High  4 = Better than Average  3 = Average  2 = Worse than Average  1 = Very Low | **Frequency of Use (5-1)**  5 = Always  4 = Often  3 = Sometimes  2 = Infrequent  1 = Never | **Importance to Job (5-1)**  5 = Very Important  4 = Somewhat Important  3 = Neutral  2 = Somewhat Unimportant  1 = Very Unimportant |
| 1. [insert skills taught here.] |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |

**Part Three:**

1. Please check all of the following ways that you support training in your department.

* Supervisor Coaching
* Peer Coaching
* On the Job Training
* Job Aids
* Electronic Performance Support Systems
* Other? (What? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

1. Please rate the effectiveness of the following training support activities in your department by checking the correct box below.

|  |  |
| --- | --- |
| **Activity** | **Very Somewhat Neutral Somewhat Very**  **Effective Effective Ineffective Ineffective** |
| Coaching by Supervisor |  |
| Coaching by Peers |  |
| On the Job Training |  |
| Job Aids |  |
| Electronic Performance Support Systems |  |
| Other (What?) |  |

1. What barriers or obstacles (if any) make it difficult for your employees to apply newly learned skills on the job?

1. What enablers or motivators help employees to apply newly learned skills on the job?
2. What changes to the training your employees took would help them to perform better?

*Thank you for completing this survey. Please return it to: [Name, Address].*

## Tool 17:

## Training ROI Worksheet

*Directions:*

Use the worksheet below to plan and calculate training ROI. Enter data in the spreadsheet and the totals are automatically calculated.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Return on Investment Worksheet** | | | | |
|  |  |  |  |  |
| **Costs** | **Category** | **Calculation** | **SubTotal** | **Grand Total** |
| Direct |  |  |  |  |
|  |  |  |  |  |
| Indirect |  |  |  |  |
| Opportunity |  |  |  |  |
| SubTotal |  |  |  | $ 0.00 |
| **Benefits** | **Category** | **Calculation** | **SubTotal** | **Grand Total** |
| Direct |  |  |  |  |
|  |  |  |  |  |
| Indirect |  |  |  |  |
| Opportunity |  |  |  |  |
| SubTotal |  |  |  | $ 0.00 |
|  |  |  |  |  |
|  | **ROI** | (B-C)/CX100 |  |  |