Learning Design Template

This deliverable documents the detailed Course Outline, detailed Learning Objectives, a description of the learning activities to be developed, and the context in which the learning will take place. Create this deliverable to confirm the learning design and finalize it to the point where actual drafting of the Learning Products can begin.

I. IPT Name:		
II. Deliverable Name: Training Design Template		**Date Completed:**
III. Contact Information		
	Name	Channel Unit
IPT Sponsor		
Channel Task Manager		
CIO Task Manager		
Contractor Task Manager		
IV. Task Order Number:		

COURSE OUTLINE EXAMPLE
COURSE OVERVIEW

Module 1	**Record Intake Details**	**XX minutes**
Topic 1	Name of Topic 1	xx minutes
Topic 2	Name of Topic 2	xx minutes
Topic 3	Name of Topic 3	xx minutes
Module 2	**Processing Special Requests**	**xx minutes**
Topic 1	Non-Casework Related	30 minutes
Topic 2	Case-related	45 minutes
Module 3	**Reviewing and Assessing Intake Information**	**xx minutes**
Topic 1	Name of Topic 1	30 minutes
Topic 2	Name of Topic 2	45 minutes
Total Course Time		XX Hours

MODULE 2, TOPIC 2

Module/Topic Title	Processing Special Requests/Case-related
Delivery Method	CBT
Prerequisites	Introduction to "Client" Course, Performing an External Records Check Course
Duration	45 minutes
Description	This topic focuses on processing case-related special requests. The first scenario walks participants through the on-line process, providing information and requiring participants to actually complete each step on the windows. The second scenario requires participants to complete the on-line steps with fewer instructions. The third scenario tests the participants by requiring them to complete the steps on their own in a simulation.
Instructional Strategies	Walkthrough, test (simulation)
Support Materials	None required
Objectives	Upon completion of this topic, participants will be able to: • Record the details about a case-related special request. • Record information about the people involved in the case. • Perform an "application" person search. • Assign a case-related special request.

TOPIC OUTLINE

INTRODUCTION

Display an introductory screen that presents the following about the topic:

- Objectives
- Timing
- Prerequisites
- Overview
  - List the three scenarios and give a brief description of each.

SCENARIO 1

WALKTHROUGH

Present the following scenario:

Caller:	Sally from Kansas CPS
Time of call:	2:30 p.m. on 9/6/94.
Request:	Courtesy interview of an individual who may be a witness in an open Kansas sexual abuse case.
Situation:	A 13-year-old reports sexual abuse from her uncle. A request is made to interview a witness concerning the case.

The participant now completes a walkthrough in which they process this case-related special request. Since this is the first time through this task on "the interface," the participant receives detailed instructions and information as they are performing the steps. These instructions appear in graphic boxes that overlay the "interface" window the participant is learning.

DEVELOPER NOTE

In this and the remaining scenarios, the participant has access to a Scenario button at the bottom of their CBT screen. If they need to know what the details of the scenario are at any time during the walkthrough or simulation, they can click on it and see the initial scenario information screen.

Steps and Learning Points:

Display the following windows and simulate the related steps. Prompt to complete the appropriate fields using the information from the scenario.

1. Intake Desktop window: Briefly overview this window and explain how they access the first window they need to process this request. Have them click on the Record Call icon.

2. Call Entry window: Remind participants that this window is the starting point for most intake-related calls.

   a. Complete the caller information:
   First, middle and last name, suffix, title, phone, phone type, city, state, county.

   Remind participants that they also got the contact's work number. Walk them through how to add this second number now. Remind them that if they need to see the scenario information again, they can click on the Scenario button at the bottom of their CBT screen.

   b. Type in comments:
   Explain that this is a free-form area, like other comment boxes they have seen before. Tell participants what information from this scenario might go in the comments box, and have them type it.

   c. Select the Narrative button:
   Explain that this takes them to a Narrative form that they will use to record the details about the call.

2. Intake Narrative window:

   a. Complete the Narrative:
   Point out the most critical pieces of information to capture here: general information, locating information, potential violence and conclusions. Tell them to record those details now.

   b. Return to Call Entry window.

3. Call Entry window:

   a. Access Persons Information
   Remind them that they can click the button or select from the pull down menu. Have them click on the button for this example.

4. Person/List Summary window: Explain that this window captures the primary details about the people involved in the case-related request. Point out that the information captured on the Call Entry automatically carries over to this window.

    a. Step 1...

SCENARIO 2 ***Not Included in Sample***

SCENARIO 3 ***Not Included in Sample***

SUMMARY SCREEN Present a summary screen that reviews the objectives of the topic.

- Objective 1
- Objective 2
- Objective 3
- Objective 4

Learning Design Report

A Learning Design Report is a comprehensive report which includes documentation on the Performance and Learning Needs Analysis, Training Program Specifications, Existing Materials Evaluation, Physical Resource Requirements, and Training Development Plans. In some cases, only sections of the Learning Design Report may be completed and other times a more detailed Learning Design Report may be needed.

This deliverable is created in the Perform Learning Detailed Design Task. The deliverable brings together detailed design components before creating the product in detail.

1. Introduction

The implementation of <INSERT Application Name> brings many benefits to <INSERT Organization Name>. These benefits include, but are not limited to, the following:

- <INSERT Benefit #1 that new application will bring to Organization>
- <INSERT Benefit #etc. that new application will bring to Organization>

However, these benefits can only be fully realized if personnel are proficient in the use of the application and its features. The key to gaining the maximum benefit from the <INSERT Application Name> is confident, skilled business representatives. Therefore, the training of personnel is crucial. This section of the report identifies the critical skills necessary for business representatives to possess in order to perform their jobs using the application and the training proposed to develop those skills. This section also describes the business representative procedures and on-line help functions that support the <INSERT Application Name>.

1.1 Curriculum Overview

Training needs have been identified at the <INSERT audience group levels> levels within <INERT Organization Name>. The needs of each group are different, although not unique. In all groups there is a need to know the application capabilities, how to access information, and how to process information. To meet these needs, various application overviews, workstation training and mainframe training will be developed.

1.2 Management Needs

In addition to the overview, workstation, and mainframe training, the management personnel need to understand how the application is used in the department(s) for which they are responsible. They must also know how their departments impact on others and how their departments are affected by others within the company.To meet these needs, it is recommended that managers attend overviews that pertain to their departments.

1.3 Supervisor Needs

The department supervisors have a need for more detailed information. They must know how to perform every task performed by their department. Supervisors, like managers, need to know how their departments impact others and how their departments are affected by other departments within the company. To meet these needs, it is recommended that supervisors attend department training in addition to the overview and workstation training and mainframe training.

1.4 Business Representative Needs

The business representatives of the application have a need for very specific information about the application. They need to know how to perform their specific job tasks and how their area impacts and is impacted by other areas within the department.

To meet these needs, it is recommended that business representatives attend the training modules that are specific to their assigned job tasks, as well as the overview and workstation training and mainframe training.

2. Training Content Needs

The course needs analysis includes identification of the training content and the training audience. In this process, the business functions, job functions and tasks within each department of the company were identified. These functions and tasks are identified in the matrices on the following pages. Next, the current business functions, job functions and tasks were analyzed against the functionality of the new application. From this analysis, training modules were identified.

Then, the business representative groups that will require training were identified. These business representative groups are <INSERT business representative groups>.

Finally, the training module needed by each business representative group was determined. Training modules will be developed so modules can be selected and grouped according to specific training audience needs. This will be particularly important if people are reassigned to different job functions.

Training needs analysis included identifying the major processing components. These components were labeled as training courses. The courses were then broken down into modules that focused on unique training needs within a course. The training courses and modules were then matched up to specific business representative groups. This information is summarized on the matrix below.

3. Audience Analysis

Training Needs By Business Representative Group, Training Module, and Phase

	Business Representative Group	<Group1>	<Group2>	<Group3>
Phase	Training Module			
<Phase#>	<INSERT M1 NAME>			
<Phase#>	<INSERT M2 NAME>			
<Phase#>	<INSERT M3 NAME>			

Audience Size Estimates by Module

Estimates have been compiled for Phase(s) <INSERT number of phases> training. The matrix below indicates the number of participants by business representative group and personnel classification that will require each training module.

Phase	Training Module	Dept.	Work	<Group1>	<Group2>	<Group3>
<Phase#>	<Module Name>	<Dept. Name>	<Type of Work>			
	<Module Name>	<Dept. Name>	<Type of Work>			
	PHASE <#> TOTALS					
		TOTAL				

3.1 Audience Characteristics

Based on observations and interviews, preliminary audience profiles, by business representative group, were compiled. These audience profiles include:

Employee Demographics

- Age
- Sex
- Formal Education
- Time in Job
- Time with Company
- Annual Turnover
- Job Responsibilities
- Career Motivation
- Attitude
- Personality
- Cross Training

Job Skills and Work Environment

- Current Computer Use
- Current Equipment
- Type of Computer Use

Work and Physical Environment

This information is summarized in the table on the following pages.

Business Representative Group	**<Bus. Representative Group>**	**<Bus. Representative Group>**
Department Positions	<INSERT Job Title>	<INSERT Job Title>
Areas		
EMPLOYEE DEMOGRAPHICS		
Formal Education	<INSERT High School> <INSERT College>	<INSERT High School> <INSERT College>
Average Time in Job	<INSERT Years>	<INSERT Years>
Average Time with Company	<INSERT Years>	<INSERT Years>
Annual Turnover	<INSERT %>	<INSERT %>
Job Responsibilities		
Cross Training		
Current Computer Use	<INSERT % of day>	<INSERT % of day>
Current Equipment		
Work / Physical Environment		

3.2 Secondary Audience Groups

In addition to the <INSERT primary audience groups>, there are other groups affected by the application. These groups are referred to as the secondary audience and consist of <INSERT secondary audience groups>.

The secondary audience will be affected by the new application in that the information they provide to and receive from the company may change. For example, <INSERT Organization-specific example of how a secondary audience group may be affected by the application>.

The changes resulting from the implementation of the application need to be communicated by sending an information piece to all secondary audience members. This information piece should be provided to the Secondary Audience prior to conversion of the phase that will impact them.

4. Procedure Effort

The procedures effort for the application includes design and development of all business representative procedures, both manual and application, which are related to the application. This includes business representative procedures for both workstation and mainframe applications. The various types of "procedures" which will be documented include:

Business Representative Procedures	▪ <INSERT business representative procedures that will be documented>. ▪ <INSERT business representative procedures that will be documented>. ▪ <INSERT business representative procedures that will be documented>.

4.1 Other Application Procedures

Other application procedures being documented by application development personnel are:

- <INSERT other application procedures which will be documented>.
- <INSERT other application procedures which will be documented>.

4.2 Recommended Approach

The recommended approach for documenting procedures is: <INSERT recommended approach>.

The rationale for this approach is: <INSERT rationale for procedures approach>.

5. On-line Help

On-line help will provide support to instructor- led training and be used as an on-the-job reference tool for workstation and mainframe application business representatives. On-line help will be created and maintained in <INSERT software package>. It will be developed by the <INSERT developer(s)> and reviewed for consistency by <INSERT reviewer(s)>.

On-line help will be available on <INSERT #> different levels:

- <INSERT each level of help and describe>.

6. Curriculum Strategy

The Curriculum Strategy pertains to the training courses and modules which will be developed for individual application functions.

7. Training Courses

The following are high level descriptions of the training courses which will be developed for business representatives:

<INSERT Course Name>	<INSERT Course Description>
<INSERT Course Name>	<INSERT Course Description>
<INSERT Course Name>	<INSERT Course Description>

8. Training Databases

As training materials are developed, it will be necessary for training developers to have access to on-line programs and data bases to verify data entry steps, validation and error messages. This requires that copies of the data bases and appropriate programs are available to training developers.

The training data bases will store all training data for workstation and mainframe application training. This data will be identified during training development. Existing data identified for application test will be the source of training data in most cases. Once captured and identified, training data will be loaded into the training data bases.

The training data bases will be tested during the development test of training materials. Any problems with training data related to walk-throughs, exercises and case studies, will be identified and resolved at this time, prior to training classes.

8.1 Workstation Training Databases

Workstation application training developers will use ++training data source++ as a training data base. This is similar to the set up of the current application test environment.

8.2 Mainframe Training Databases

Mainframe application training developers will use copies of the mainframe data bases, designated as training data bases. This is similar to the set up of the current application test environment.

8.3 Exercises and Case Studies

Exercises and case studies will be developed in such a way to minimize the effort in the initial set-up of the training data base. For example, wherever possible, participants will enter data during training exercises and/or case studies, which will be updated, canceled, deleted, etc. in the subsequent exercises and/or case studies.

This will eliminate the need for creating numerous sets of data prior to training for each participant. This approach will not always be appropriate, and it is anticipated there will be some maintenance of training data prior to instruction.

9. Training Materials

Training materials are a part of a performance support application which also includes procedures and on-line help. Training developers will integrate procedures and on-line help into training materials to create a total training package. Procedures and on-line help will be developed by the <INSERT developer(s)>.

Training materials will be designed to:

- Provide a clear and consistent approach to learning to help ensure consistent job performance.
- Give participants "hands on" practice in using the application in a risk-free environment.

Training is being developed in <INSERT instructional approach> format. The following training materials are being developed to support this format:

<INSERT Training Material>	<INSERT Training Material>
<INSERT Training Material>	<INSERT Training Material>
<INSERT Training Material>	<INSERT Training Material>

10. Evaluation Plan

This section of the report describes the suggested evaluation approach to be used during and after training conducts.

Once training materials are developed and classes conducted, it is recommended that training materials are evaluated on an on-going basis in order to:

- Keep training materials current, particularly if being used for on-going training.
- Identify weaknesses in training materials which may need to be enhanced.
- Determine if training is meeting specified learning objectives.
- Determine if information presented in training is applicable to the participants' jobs.

Evaluation of training will occur at four levels:

- <u>Reaction level</u> evaluation will assess instructor and participant reaction to the course design and the effectiveness of the instructional approaches.
- <u>Learning level</u> evaluation will assess how well the participants learned the concepts presented.
- <u>Performance level</u> evaluation will help evaluate the effects of the training towards on-the-job performance.
- <u>Results level</u> evaluation will help assess the impact of the training on the organization and its key performance indicators.

10.1 Reaction Level Evaluation

Data will be gathered from all pilot participants.

Reaction to the following will be assessed:

- Logical sequence of course content
- Relevance to job
- Terminology
- Pace
- Difficulty
- Instructors
- Data will be collected and analyzed for each course as follows:
- Questionnaires administered at the end of each module will be analyzed in terms of average scores for each item. Aggregate item data will also be tabulated.
- Daily participant interviews covering all modules taught that day will be analyzed to determine the content and frequency of responses.
- Data from observation of course conducts will be grouped by module and analyzed to determine the content and frequency of observations.

All data will be carefully analyzed. Based on results of the analysis, modifications to the instruction will be recommended. These will be documented in an evaluation report for each course.

After the pilot test, your company will be responsible for collecting and analyzing data for reaction level evaluation.

10.2 Learning Level Evaluation

Data will be gathered from all pilot and first conducts. Learning will be assessed via a quiz at the end of each course. This quiz will assess how well participants learned the concepts presented in the course. The minimum passing score will be 70%.

The second measure of learning will be based on participant performance in the case study exercises. Data will be collected and analyzed to determine potential course revisions. Based on results of the analysis, modifications to the instruction will be recommended. These will be documented in an evaluation report for each course.

After the pilot test, your company will be responsible for collecting and analyzing data for learning level evaluation.

10.3 Performance Level Evaluation

Plans for performance level evaluation will include measuring the transfer of newly acquired skills and knowledge to the job. Data should be gathered jointly for all courses. Preliminary plans call for gathering information from two sources:

- Supervisor interviews to determine their observations of employee performance.
- Examination of applications and unit error logs.

Data will be gathered at one, three and six months after training. This will help assess the short-, medium-, and long-term effects of training.

Data will be examined in terms of the frequency and content of supervisor comments.

10.4 Results Level Evaluation

Plans for results level evaluation will include measuring the organizational impact of all courses. Again, data should be gathered jointly for all courses. Preliminary plans call for gathering information from three sources:

- Productivity reports will be examined for the six months following training. Pre-training productivity will be compared to post-training productivity.
- Customer and agent complaint logs will be examined each quarter for the year following training. Pre-training complaint rates and content will be compared to post-training rates and content.
- Policyholders will be interviewed six months after training. These interviews will help assess whether the implementation of the application was, in fact, transparent to the customers.

11. Course Specifications

Course Specifications for one of the courses has been drafted, and is provided in this section:

<INSERT Course Name>

Included in the course specifications are:
- Descriptions of the audience
- Learning objectives
- Content and teaching methodologies
- Participant activities
- Estimated training times

The training team will continue to draft design specifications for the remaining modules as workflows and procedures become available.

<INSERT Course Name>
Table of Contents

Course Title:	
Primary Audience:	
Secondary Audience:	
Purpose:	
Maximum Class Size:	
Course Modules:	
Course Length:	
Course Objectives:	

Module <INSERT #> <hours, minutes>:	
Objectives:	
Presentation:	
Activities:	

12. Existing Materials

An existing materials evaluation was conducted to determine whether current training materials could satisfy the training needs and to identify which package, if any, is the most appropriate for the training under development.

Existing Training Material	Evaluation Procedure	Strengths/ Deficiencies	Risks/Implications of Using

13. Development

The Training Development Timeline is found on page <INSERT page #>. Complete dates are specified for the following processing steps by module:

- Detailed design
- Materials development
- Development test
- Pilot test
- Instructor training
- Course conduct

13.1 Assumptions

The complete dates are based upon the following assumptions:

- <INSERT assumption(s)>

13.2 Risks

The following are the risks that may affect the training development effort:

- <INSERT risk(s)>

13.3 On-going Maintenance

After all training classes have been conducted, it can be assumed there will need to be changes made to the training materials to reflect enhancements to the application and correction of any errors that may have occurred during training.

It can also be expected that manual procedures will also need some updating. New manual procedures may be identified as needed during the training conduct. It will be necessary to identify support personnel who can continue to update training materials and manual procedures.