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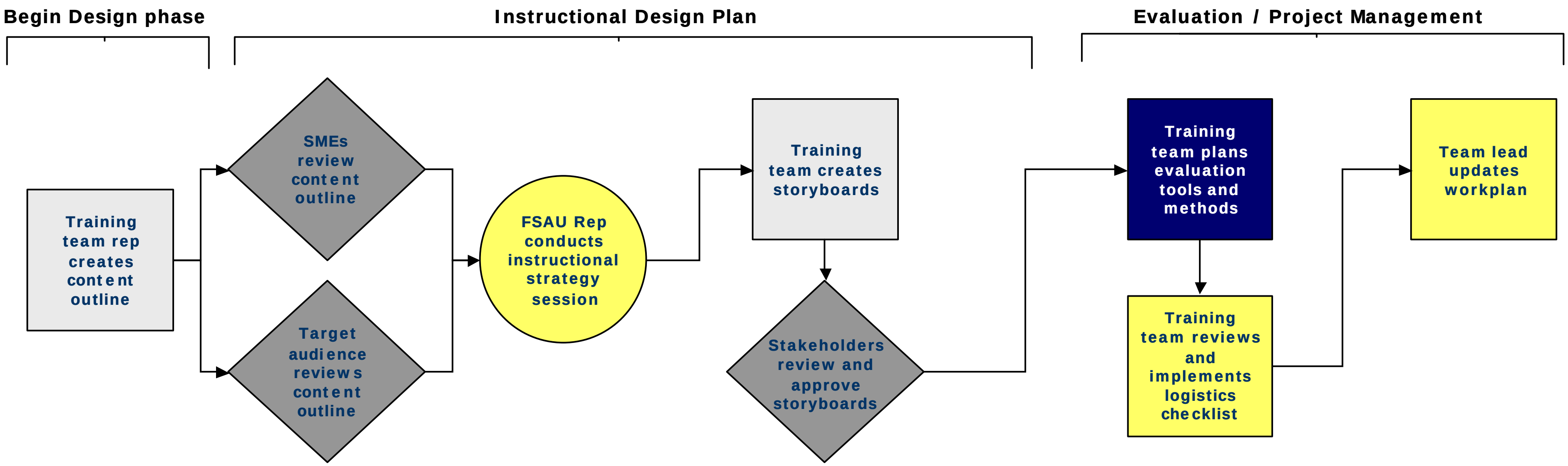
Design Phase Flow Chart



Sponsors & Stakeholders

FSAU Representative(s) or designee
(Coach or team member who represents FSAU;
Could be a staff member or operating partner, from a Channel or FSAU)

Training Development Team

Instructional Design Plan
Includes the content outline, instructional strategy session, and storyboards

Content Review
Includes the SME review of content outline, customer review of content outline, and stakeholder review of storyboards

Evaluation Strategy
Includes the plan for evaluation tools and methods

Project Management
Includes the instructional strategy session, updated workplan, and logistics checklist

Design Phase Overview

This overview lists the Design phase inputs and outcomes necessary to develop training that is relevant, interactive, engaging, polished, and supported. Refer to the overall process checklist for additional context.

Inputs

What are the necessary inputs to complete this phase?

- ❑ Audience analysis
- ❑ Learning objectives
- ❑ Content scope
- ❑ Delivery strategy
- ❑ Baseline budget
- ❑ Workplan
- ❑ Role map
- ❑ Stakeholder analysis and communication plan
- ❑ Logistics strategy
- ❑ Signed task order

Description/Explanation

What are the components of the Design Phase?

- Once the task order has been awarded (if applicable), the instructional designer(s) meet with the appropriate SMEs to create the detailed content outline. The team, SMEs, and customers then review the outline for accuracy and completeness.
- After the content outline has been approved, the entire development team and SMEs (if appropriate) convene to create the storyboards and learning activities. Once complete, the storyboards are reviewed by key sponsors and stakeholders for approval.
- The team then selects and designs an evaluation strategy for the course.
- The project management must update the workplan and review/ update the logistics checklist.

Outcomes

What are the outcomes of this phase?

- ❑ Instructional design plan (includes content outline and storyboards)
- ❑ Evaluation strategy
- ❑ Logistics checklist

Create Content Outline

The content outline is created by a small group of training development team members. It provides structure for a training program and builds on the content scope and learning objectives completed in the Plan phase, adding detail, clarification, and supporting information. As the Design phase proceeds, the content outline is updated to include new or modified information, such as types of activities, sequence of events, and edited content. The result is an overview of course contents and methods.

How to create a content outline:
Review the content scope and learning objectives from the Plan phase. From this information, list the key concepts (and the corresponding learning objective) identified in the Plan phase. Then, gather detailed content for each key concept and group similar concepts into course modules. Later, after learning activities have been created, the content outline is updated to include these activities and any other necessary adjustments.

The template includes the following components:

Key Concepts
- List key concepts from the content scope in the Plan phase
- Identify the corresponding learning objective for each, also from the Plan phase

Detailed Content
- Gather and document supporting information or detail for each concept

Modules
- What concepts go together?
    - Combine similar categories and group the content
    - Determine module name by common theme
- Place modules in appropriate course sequence
    - Identify a logical progression for modules
    - Sequence content in the order used on the job
    - Cover critical tasks (incorporate “need to know” content first, and then, if applicable, “nice to know” content)

After drafting the content outline:
- Review content outline with team
- Review content information with SMEs (refer to the *Conduct Reviews* document)
- Update the content outline to reflect new or additional information
- Send content outline to team prior to instructional strategy session

Content Outline Template

Module:	
Key Concept:	**Activity:**
Learning Objective:	
(Add detailed content to support key concept)	

Conduct Reviews

The review process

- Complete content outline
- ***Conduct SME/customer review of content outline***
- Conduct instructional strategy session (create storyboards and activities)
- ***Conduct stakeholder review of storyboards***

These reviews validate the instructional design plan (content outline, learning activities and storyboards). In the initial review, internal Subject Matter Experts (SME) evaluate the content outline for accuracy and completeness. Based on SME input, the content outline is updated. It is recommended that customers (who are typical of the anticipated training audience) review the updated content outline. After this review confirms that the content is appropriate for the target audience, the development team creates storyboards. The third review validates the storyboards with the project sponsor(s) and stakeholders. During the storyboard review, it is recommended to post storyboards (whether created online or in paper-based format) where reviewers can see all the slides. It is also advisable for the presenter to explain the entire series of storyboards, then take any questions or comments. This allows reviews to see the course holistically before providing suggestions.

Refer to the training request form and stakeholder analysis to identify reviewers for this phase. The initial review ensures that the content outline meets the needs of the course participants, the second review validates the direction of the course with potential customers, and the third review engages project sponsor(s) and gains their approval. This minimizes rework and enhances project support.

How to perform the review(s)

Present the content outline to SMEs/customers or storyboards to sponsor/stakeholder(s) and elicit the following information:

Subject Matter Experts

- Are the key concepts correct?
- Does the detailed content support the key concepts?
- Is the content correct?
- Is any content missing?
- Is there content that could be deleted?
- In what order should the content areas be presented to an audience?
- Any suggestions for learning activities?

Customer

- Are the key concepts correct?
- Is the content appropriate for the target audience?
- What other information would be helpful?
- What content would you add / delete?
- Any other suggestions?

Sponsor/stakeholder(s)

- Does the storyboard meet your stated training request?
- If not, what needs to be added/subtracted?
- What suggestions do you have to enhance the training program?

Remember to gain formal approval of the instructional design plan before commencing the Build phase!

Conduct Instructional Strategy Session

The instructional strategy session has two main components: storyboarding and creating learning activities. The content outline provides the basis for both of these components. By creating storyboards, the team sequences modules and determines the appropriate instructional strategies and activities. Instructional strategy builds on delivery strategy, determines an approach for presenting content, and provides the basis for detailed learning activities.

Storyboards can be created online, as in a PowerPoint presentation, or on paper. The paper-based approach is most conducive to an instructional strategy session. If storyboards are created online, it is useful to print the slides for presentations so the audience can see the whole "story." This document provides suggestions for developing paper-based storyboards, though the information can be adapted to develop these materials online.

After a draft of the storyboard presentation is created, the team conducts a pitch and plus session. During this activity, individuals or teams present the instructional program they drew. Other team members then make suggestions, recommending certain panels be rearranged, added, or removed. When completed, the storyboards serve as a tool for review, communication, and pitching the program with stakeholders and subject matter experts.

Storyboarding Process:

- Review content outline
- Create storyboards
    - Identify course themes
    - Review the instructional strategies information included in the appendix
    - Create detailed instructional activities
- Update content outline to include learning activities and other changes

Storyboarding includes the following main purposes:

1. *Visual communication*
    - Visual images and impressions build a common understanding of the project.

2. *Collaboration*
    - Unlike a written document that is controlled by one individual at a time, storyboards allow participants to be on the same page at the same time, share artistically in the final product, and provide equal input.

3. *Instructional strategy*
    - During the storyboarding session, the team determines which instructional strategies and activities would best convey the course content. Storyboards depict these approaches in a way that is easily shared with stakeholders and others.

Storyboarding elements:

Visual: Drawings represent or suggest the learning event. This can be literal or figurative. In other words, rather than doing a drawing that shows a classroom of individuals in a debrief discussion with one another, simply place a "D" followed by a pair of men's briefs to suggest the idea of a debrief. Remember, keep the drawing clean and easy to read, limiting detail.

Text: In the same spirit of the visual, resist the temptation to write out the script. Place just a few words in the text box, outlining the key points with text that is legible and easy to read. When the storyboards are presented, a the more complete "story" can be told.

Panels: Number the storyboard panels so they can be placed in order when removed from the board. Since the panels may be rearranged a few times, write the number in pencil.

Materials Needed:

- Storyboard Panels
- Markers—Wide Tip, Variety
- Pencils
- Scissors—If necessary
- Boards or backing to place the panels on
- Tape or pins to attach the panels
- Flipchart
- Sample storyboard
- Depiction or listing of instructional strategies

Storyboard suggestions / guidelines:

- Keep the focus of the storyboard sharp and defined
- Communicate visually -- help others to understand ideas
- Encourage all participants to add to the storyboard, promoting collaboration
- Focus on clear visual images over text-heavy labels
- Provide a variety of markers, cards, and other resources for participants
- Pitch and plus after storyboards are developed
  – Individuals pitch presentation to others, gather ideas, and update storyboards

Tips for creating storyboards:

- Use lots of color
- Use banners for key places where you are starting and stopping
- Allow time to clean up messy storyboard panels
- Keep drawings simple—even representational
- Display storyboards in an orderly fashion, row by row
- Number the panels in pencil
- Make your text clean and simple
- Use small post-its to suggest the flow of time.
- Have fun!

Time allocation for creating storyboards:

- 25% Clarification around objectives/content
- 50% Brainstorming around ideas on how to present/creation of storyboard panels
- 25% Refinement, polishing, and ordering of storyboards.

Additional instructional strategy elements:

- Determine media requirements
- Review and adopt training material standards

Plan Evaluation/Measurement Tools & Methods

What is an evaluation instrument?
An evaluation instrument measures various aspects of the training. Evaluations range from simple classroom reaction to complex performance measures, such as improved productivity or behavioral changes.

FSA University currently uses two instruments, the Training Satisfaction Survey and the Trainer Report. The Training Satisfaction Survey rates the course, facilitator and training environment. This provides audience reactions to the session, the facilitator and the training environment. It does not measure the effectiveness of the session. The Trainer Report allows instructor input on materials, training environment, and hot topic issues with the audience.

When to evaluate:
Assessment occurs throughout the training, not just at the end of the series. Consider the following questions when developing a plan for its use:

- When will evaluation be conducted?
- When will the results be assessed?
- How and when will the assessment results be incorporated?
- Can evaluations be integrated within a learning activity?

During this phase of the training cycle, begin designing evaluations for the dry run, the pilot, the train the trainer and the course itself.

Types of Evaluation:
Three different types of evaluations will be developed for the various sections. Develop separate evaluations that assess:

- The accuracy of the course content (materials) – use during dry run, pilot
- The quality of the course – use during pilot, course
- The quality of the train the trainer session – use during train the trainer

Note: Additional evaluations may be developed to assess the quality of individual sessions or learning activities. However, these should not be used during the actual delivery of the course to participants.

Sample evaluations can be found in the **Sample** appendix.

Considerations:
The evaluation strategy needs to be planned up front. At this stage consider the delivery time frame and project budget:

- Does the budget support extensive user testing and/or one-on-one interviewing?
- Can the pre/post tests be conducted and evaluated in time to make needed changes in the material?
- Is there a user group that mirrors the target audience?