

## Glossary

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**Analysis.** The evaluations completed throughout the development and delivery of a training course are examined to measure the effectiveness of content, presentation, and other factors.

**Assess Phase.** The fifth phase of the training process. As part of the deployment stage, the trainer and participant evaluations are collected, summarized, and analyzed. From this analysis a final report is created. The Assess phase includes the following major deliverables: Evaluation & Analysis, Celebration & Lessons Learned, and Project Management.

**Audience Analysis.** Identifies groups of individuals for whom the training is intended. It outlines and distinguishes audience group characteristics and their job activities to meet the specific needs of the training audience.

**Budget.** A plan for the labor and expenses of a project. It estimates the training development and delivery efforts by labor and materials/equipment needed to complete the project.

**Build Phase.** The third phase of the training process. As part of the development stage, the course materials are developed and thoroughly tested. The Build Phase includes the following major deliverables: Course Materials, Evaluation/Measurement, Testing, Training of Trainers (TOT), Training Logistics, and Project Management.

**Celebration.** A recognition activity to acknowledge contributions and successes of a project. Celebrations can include: Recap of effort involved, discussion of accomplishments, review of evaluation results, sharing of stories, and appreciation for contributions.

**Communication Plan.** This document maps the type and frequency of communication to the stakeholders to keep them up to date with accurate information and ensure their continued support for the project.

**Content Outline.** This document provides an overview of course content and methods for a training program, such as types of activities, sequence of events, and specific content. It builds on the content scope and the learning objectives, adding detail, clarification, and supporting information.

**Content Scope.** This document provides a list of topics to be addressed by the training course. These topics bridge the gap between existing knowledge and knowledge necessary to achieve the learning objectives.

**Contracting Officer Representative (COR).** A person who supports the training development and delivery effort by negotiating the contract with the operating partner.

**Course Materials.** The resources developed from the instructional design plan and detailed course content. They may be paper-based or online and include materials to prepare an instructor to conduct training (if applicable), to enhance and sustain

participant skills, and support the help processes for the participant during and after the training course.

**Customer Satisfaction Survey.** The evaluation that participants complete at the end of a training course. This document collects information about the site, the materials, and the training experience.

**(Major) Deliverables.** A group of training development and delivery tasks that creates a product or session.

**Deliver Phase.** The fourth phase of the training process. As part of the deployment stage, the trainers present the program to its intended audience.

**Delivery Strategy.** The medium used to deliver training to participants. The delivery strategy is what participants “see” and experience, making it the most visible portion of the instructional design.

**Deployment Stage.** The second stage of the training process. During this stage the training is delivered and assessed.

**Design Phase.** The second phase of the training process. As part of the development stage, plans are drafted to prepare for the development and testing of training materials. The Design phase includes the following major deliverables: Instructional Design Plan, Evaluation Strategy, and Project Management.

**Development Stage.** The first stage of the training process. During this stage the training program is planned, designed, and built.

**Development Team.** These members are part of the project team. They assist in planning, designing, building, and assessing the course.

**Dry Run.** A material review with SMEs after the completion of the first draft. The Development team and SMEs walk through all training materials page by page to confirm accuracy and to gather feedback to improve the training prior to conducting an external pilot.

**Engaging.** One of the five keys for effective training. Refers to providing instruction that actively involves the participant. Three strategies can be used to make training engaging: presentation, facilitation, and coaching.

**Evaluation.** A method to determine the value of various aspects of the training program by careful appraisal and study.

**Evaluation Instrument.** The tool that measures the various aspects of training. Evaluations range from simple classroom reaction to complex performance measures, such as improved productivity or behavioral changes. FSAU uses the Customer Satisfaction Survey and the Trainer Report.

**Evaluation Strategy.** This plan defines when evaluations will be conducted (dry run, pilot, TOT, etc.), when the results will be assessed, and how the results will be incorporated.

**Federal Student Aid University (FSAU).** FSAU falls under the jurisdiction of the Office of Federal Student Aid, which is under the U. S. Department of Education (ED). FSAU is responsible for developing and delivering training internally, as well as to the financial aid community, among other employee development activities.

**Final Report.** This document is produced at the end of the Assess phase to summarize the evaluation data and provide recommendations to future teams.

**Instructional Strategy.** The method by which information (content) is organized and sequenced (learning activities).

**Instructional Strategy Session.** This gathering consists of two components: Storyboarding and creating learning activities. The content outline provides the basis for both of these components.

**Instructor Guide.** This documents information required by an instructor to prepare for and conduct the training course. Generally, instructor guides include: presentation notes for introduction and closing, faculty notes and checkpoints, and special instructions for learning activities conducted during the course.

**Interactive.** One of the five keys for effective training. This refers to providing instruction that builds off of relationships, particularly in the classroom setting.

**Job Aid.** A tool to assist with the specific steps to complete a task.

**Kick-Off Meeting.** The first meeting of the training project team at the beginning of the Plan phase. The initial training plan and project plan are introduced and finalized.

**Leadership Team.** Consists of the project manager and project sponsor of the training course. This team sets the strategic direction, controls funding, and oversees the project teamwork.

**Learning Objective.** Describes what participants will be able to do after training. There are three components of a learning objective: Performance/action, environment/condition, and measure/criterion.

**Lessons Learned.** A session to capture the key elements of the design, development, logistics, and delivery processes for future teams. It encourages recognition of employee work, expresses gratitude for tasks achieved, and validates the successes of a collaborative effort.

**Logistics Coordinators.** Part of the support team. These team members plan and execute the logistics strategy for the training course.

**Logistic Coordinator Levels.** The level of logistic support necessary for a training course.

- Level 1 = ½ day of support. The LC will be expected to perform duties one hour before and up to one hour after the training ends.

- Level 2 = 1 day or more. In addition to the duties of Level 1, the LC will be on call all day and obligated three appearances: One hour before, mid-day, and workshop closing.
- Level 3 = Includes both Level 1 and 2. LC will be required to stay all day at the training with high interaction, (Regional training and conferences.)

**Logistics Strategy.** This plan defines when logistics support is necessary during the training development and delivery process (kick-off meetings, instructional strategy session, dry run, pilot, TOT, course, etc.).

**Maintenance Plan.** This strategy defines the process for updates to the training course, including the materials and the delivery format. The maintenance plan is created prior to delivering training.

**Media.** This refers to how information is delivered, including, electronic text (PowerPoint), graphics, video, sound, and animation.

**Mementos.** (Takeaways/learning enhancers) These items/reminders of the training are given to each participant during the course. They can also be used to encourage participation throughout the sessions. This is a “useful” item, i.e. a mouse pad with a list of customer service or help desk phone numbers.

**Ongoing Training.** The delivery of the training sessions, including, conducting and submitting trainee and trainer evaluations.

**Overview Documents.** These materials provide the necessary inputs to begin a phase, a description of the components of the phase, and a list of phase outcomes. There is an overview document for each of the five phases.

**Participant.** Individuals who attend the training course.

**Participant Guide.** This provides job related task practice in the training environment and useful reference materials participants use after the class.

**Performance Support.** This provides assistance to the participant during and after training to complete a task. Examples include: Job aids, process descriptions/workflows, procedures, help desk (hotline), and online help.

**Phases.** The five parts of the training process. They are: Plan, Design, Build, Deliver, and Assess.

**Pilot.** This is a model of the final draft of the training program, where a sample of the intended audience participants. The audience provides presenters with a realistic course experience. During these sessions, the development team determines what portions need to be revised.

**Plan Phase.** The first phase of the training process. As part of the development stage, training needs are identified and high-level project plans are created. Major deliverables include: Training Needs Assessment, Training Plan, Project Plan.

**Polished.** One of the five keys for effective training. Refers to paying attention to the details of the program, whether they reside in the facilitator, the program setting, or in the processes that shape the training experience.

**Project Management.** Responsibility of the team lead and the leadership team to oversee project communication, tasks, and deliverables throughout the entire process.

**Project Manager.** A person who establishes and supports the team, monitors the budget, and reviews major deliverables.

**Project Plan.** This is the core management plan for carrying out the development and delivery of training. This includes: Role map, budget, and workplan, and task order.

**Project Team.** The team devoted to developing and deploying the training course. The team consists of the team lead, development team, instructional designer, and trainers.

**Project Team Lead.** A person who is accountable for supporting the team, assisting in all phases of the project, monitoring work, and reviewing deliverables.

**Registration.** Formally enroll in a training course. FSAU automates this process over the web using a Learning Management System (LMS).

**Relevant.** One of the five keys for effective training. Refers to providing instruction that meets the needs and objectives of the participant.

**Role Map.** This document provides information about the roles and responsibilities of each training team member to develop and deliver training.

**Sponsor(s).** Any person(s) who has requested or is responsible for a training initiative.

**Stages.** The two main components of the training process: The Development stage and the Deployment stage.

**Stakeholder.** Someone who affects or is affected by the development and/or delivery of the training course.

**Stakeholder Analysis.** This process identifies potential stakeholders and their level of involvement with the training course.

**Storyboards.** Drawings or visual representations of the training course. They can be created online, as a PowerPoint presentation, or on paper. When completed, storyboards serve as a tool for review, communication, and pitching the program to stakeholders and SMEs.

**Subject Matter Expert (SME).** A person(s) who provides technical or administrative support throughout the entire training process.

**Supported.** One of the five keys for effective training. Refers to activities and processes “behind the scenes” that support the “on stage” delivery of training.

**Support Team.** This team consists of the COR, communication liaison, logistics coordinator, technical advisor, graphics designer, media coordinator, maintenance, and content support. They provide FSAU services to the project team as needed.

**Task Order.** A contract that outlines the responsibilities, deliverables, and timeframes of an operating partner (if assisting with the development and/or delivery of training). It is written by the COR, with input from the team lead, at the end of the Plan phase.

**Template.** A document that has a preset format (such as a table), used as a starting point for a particular task so that the format does not have to be recreated each time it is used.

**Trainer/Facilitator.** The person(s) who delivers the training material. The Department uses Federal employees and non-Federal individuals (when appropriate). Also referred to as CAMs, IIS's, and TO's.

**Trainer Report.** An evaluation each trainer completes after every training session.

**Trainer Toolkit.** A document that explains the roles and responsibilities of the training team, processes for communicating with the rest of training team, and additional guidelines/suggestions for trainers.

**Training Needs Assessment.** This study answers the following basic questions about the training program: Who, what, when, where, and how. Initially a problem or need is identified, after which a solution is proposed.

**Training Development and Delivery Process.** A flexible framework for creating training programs within FSA. It establishes a standard method to assist teams involved in this effort. The process is comprised of stages, phases, and major deliverables. The two main stages are development and deployment. Training development is comprised of the Plan, Design, and Build phases. Training deployment is comprised of the Deliver and Assess phases. Often there are different teams for these two stages.

**Training of Trainers.** A session to prepare facilitators to present the training program. There are several components to the preparation: Provide a model of the training program, explain the instructional design and intent, and prepare trainers in presentation techniques and content understanding.

**Training Plan.** A high-level strategy that includes the audience analysis, learning objectives, content scope, delivery strategy, logistics strategy, and stakeholder analysis. The plan serves as input for the instructional design plan.

**Training Request Form.** A sponsor requesting a training course completes this questionnaire. The sponsor provides FSAU with enough information to formally initiate the design and development of the requested program.

**Workplan.** This document serves as the roadmap for a project. It defines the schedule, assigns tasks, and confirms steps are completed as planned and is completed by the team lead during the Plan phase, with input from the team.