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Websites for further information

This link takes you to a site with “everything a trainer needs to know.” The site has a strange name, but excellent content.
http://www.nwlink.com/~donclark/hrd.html

This link takes you to the Quick-Start Guide to the DHS and OHA Training Standards. It has questions you should ask yourself as you design and develop training at DHS or OHA.
www.dhs.state.or.us/training/Tools.htm

These links take you to DHS Communications manuals. Your training materials need to conform to the information you will find in these manuals.

The information and Web links contained in this resource are current as of June 2013. The Oregon Department of Human Services (DHS) and the Oregon Health Authority (OHA) desire to keep the contents accurate and up-to-date. Therefore, if you discover errors or out-of-date information or links, you are encouraged to communicate your findings to Organization and Employee Development Services. Email your comments to dhs/training@state.or.us or call 503-947-5754.
Introduction

A 2004 Department of Human Services (DHS) survey showed that DHS has approximately 20–25 training and development specialists and about 200 staff members who do training as part of their jobs. These comprise the DHS training community. In the following pages, we use “trainer” to refer to these people and address this manual to “you,” assuming you are a member of that community.

This training community has varying skill levels. Currently, DHS and OHA do not have a consistent method of developing trainer or subject matter expert (SMEs) abilities so you are skilled in:

- Maximizing training time;
- Assessing training needs;
- Using best practices; and
- Creating effective activities and materials.

This manual and its companion, the “Quick-Start Guide to DHS and OHA Training Standards,” are designed to help fill this Performance Gap.

Both give you the DHS and OHA Training Standards adopted by the Employee Training Council. The Quick-Start Guide gives an overview of the elements of successful training. For more detailed explanations, it refers to the expanded information in this manual’s modules.

This manual explains Instructional System Design (ISD) and the ADDIE model (the process DHS and OHA expect the training community to follow when creating training). It lists and explains training terms and has a resource section with book titles and Web sites where you may go for additional help. The final sections have checklists, templates and Trainer Tools. You may print these to use as you design, develop, present and evaluate your training.

We hope you find these modules helpful.

In June 2013, this training standards manual and the quick-start guide were updated to reflect their adoption by the Oregon Health Authority. At the same time, the Trainer Tools section was added to provide trainers help with planning and presenting consistently effective trainings.

Quality is never an accident; it is always the result of high intention, sincere effort, intelligent direction, and skilled alternatives.

—Willa A. Foster
DHS and OHA Training Standards

To ensure that training meets the following DHS and OHA standards, trainers should refer to the information found in this manual and in the online Quick-Start Guide to the DHS and OHA Training Standards. Training materials are expected to conform to the DHS and OHA communications offices’ style guides. Principles of Adult Learning apply to all of the following:

Pre-Design

At DHS and OHA, trainers will:

- Assess whether training is appropriate and which training method is best suited to the need.
- Involve customers, managers, subject matter experts and partners in planning and pilots.

Design

At DHS and OHA, trainers will:

- Incorporate into objectives, lesson plans, training approaches and evaluation:
  - Adult Learning Principles;
  - DHS and/or OHA mission, goals, core values and initiatives;
  - Concepts of diversity and cultural competence;
  - Industry standards (Robert Mager, Benjamin Bloom, Donald and James Kirkpatrick).
- Select delivery methods using DHS and OHA Training Methodologies — Decision Guidelines.

Develop/present/implement

At DHS and OHA, trainers will:

- Create materials that:
  - Are relevant, legible, at the appropriate reading level and conform to DHS and OHA design manuals.
  - Include concepts of diversity and cultural competence.

Be able to:

- Facilitate, manage the classroom, question, give feedback;
- Conduct learner-centered activities that promote retention and transfer of knowledge and skills;
- Model the core values and demonstrate cultural competence;
- Evaluate sessions using a learner-response questionnaire.

See Websites page at beginning of manual for sites with helpful explanations.
Instructional System Design (ISD) and training vocabulary

ISD is a process for systematically producing training. There are different models associated with ISD; DHS and OHA expects its training community to use the ADDIE model.

The five stage ADDIE model looks like this and is explained in detail in this manual.

(You evaluate during each phase and at the end.)

Training vocabulary

As is common in most fields of work, training uses specialized terms and acronyms and recognizes certain individuals by name for the important contributions they have made to the field. The following list describes several of these terms and names. We include it so you can build a working vocabulary that will help you as you use this manual and when you research training topics elsewhere.

ADDIE

The acronym for the five-stage process of Instructional System Design (ISD) model used by those who design instruction and/or produce training. The stages are: assess, design, develop, implement and evaluate. The outcome of each stage feeds into the following ones. (See the individual modules for more information on each stage that will help you meet the DHS and OHA Training Standards.)

This model is taught by the Organization and Employee Development Services in Train the Trainer classes where you can learn to create effective learner-centered/performance-based training.

Adult Learning Principles

Adult learners have certain preferences that influence their learning such as relevance and involvement in the learning and goals. Paying attention to these principles when you design training will give you a greater chance for effectiveness. These principles are in this manual’s Design Module.
Bloom’s Taxonomy
A tool for writing learning objectives. It categorizes verbs and displays them in a comparative way. This way, you can see which words make up lower-level skills compared to higher levels. For example, the ability to “recite or list” is a lower-level ability compared to “analyze or evaluate.” This tool helps you write your learning objective so it accurately describes the behavior or knowledge you are expecting of your learner. More taxonomy information is in the Design Module.

Chunk
A portion or segment of training designed to achieve an outcome. A chunk may be a concept, an activity, a lesson, a module. It is a division of experience the learner can process and use with other chunks to make up the whole learning experience. You present your training in appropriately sized chunks so the learner can take it all in. Look in the Design Module for more information on organizing content.

Competencies
Skills which those doing training functions should have or should be developing. Competency lists for instructors, designers, training managers and evaluators can be found on the Web site for the International Board of Standards for Training, Performance and Instruction (ibstpi). See their information in the Resources section.

Cooperative Learning
An instructional method in which learners take active parts and responsibility for learning the material being taught. Trainers have the learners work together to ensure that each member of the group succeeds. This method works well to honor Adult Learning Principles.

ibstpi
The abbreviation for the International Board of Standards for Training, Performance and Instruction. Its website is a good source for lists of training competencies.

Instructional System Design (ISD)
Instructional design is the practice of arranging training materials and content to help learners and trainers transfer knowledge most effectively. The process requires determining the current state of learner understanding, defining the end goal of instruction and then creating training to move learners to this goal. (This is known as closing the “Performance Gap”). DHS and OHA use the ADDIE model of ISD.
KSAs
The abbreviation for knowledge/skills/attitudes (or abilities). Your purpose in training is to change learners’ KSAs. After your training, they will know/do/think or feel something they did not or could not before the training. Your job is to decide what KSAs learners need, those they already have and what is required to get them to the new KSAs.

Kirkpatrick’s Four Levels of Evaluation
Donald L. and James D. Kirkpatrick are authors of “Evaluating Training Programs, The Four Levels.” This book describes how to do evaluations and explains the four increasingly complex levels of evaluation (reaction, learning, transfer and results).

As part of the DHS and OHA training community, you are expected to always do a formal level-one evaluation (the typical “end of class” handout) to get learners’ reactions. Evaluations at the higher levels will give you information about what was learned, retained and used over time. You will find more information in the Evaluate Module that will help you meet the DHS and OHA Training Standard on evaluation.

Learning modalities (VAK)
The three ways learners interact with what is being presented: by sight, by sound, by feel. All learners have their own preferences for one or more of these.

• Visual: recalls as if seeing movie in mind, wants to see things to learn.
• Auditory: recalls how things sound; wants to hear and be able to say to learn.
• Kinesthetic: recalls how it feels; wants to move or manipulate things to learn. In your training design and delivery, include opportunities for all three modalities. See Design Module.

Learning styles (Anthony Gregorc)
Research shows that people have a preference for how they take in information: either “concrete” — through their senses, or “abstract” — without the need to experience it personally. (Example: Do you taste milk someone says is sour, or accept what they say?)

Once information is taken in, people’s minds process it in one of two ways: either in some order — “sequential” — or without a particular order — “random.” Learn your own style then design and deliver training that also includes the other style. Learning styles descriptions and recommended methods are in the Design Module.

Mager’s Performance Model
Robert Mager has developed a model that allows trainers to determine whether training is the correct solution to poor performance, or if some other approach such as practice, feedback or consequences should be used. (See Mager’s model in the Checklists and Templates section.)
Mind Map/Word Web
A method of brainstorming that takes advantage of the brain’s ability to randomly generate ideas. Method: A circle or square is drawn in the center of a sheet of paper or on a flip chart. The trainer or the participants draw “spokes” out from the central image and adds words that relate to the central topic. Spokes may branch into smaller and smaller related terms or ideas.

This is a good visual method to capture learners’ thinking about a topic and build on each others’ responses. It is also very useful for generating ideas when designing training; use it to capture steps or ideas then sequence them in a follow up activity. You can search the Web with “Mind Map” for more information and examples.

Performance Gap
This is the discrepancy between what the learners actually know/are able to do and think or feel and what, ideally, they should know/can do/think or feel (these are KSAs). This gap in performance is why training (or another solution like practice or refresher) is needed. When you accurately define this difference between what exists and what is desired, you can design and deliver appropriate solutions that close the gap — then what is desired is the same as what is actually happening. (See the diagram in the Assess Module.)

Presentation
This is just one part of training — the delivery, but it is often mistaken as “the training.” Effective “training” is creating a learning experience with and for the learner. (See entry for learner centered/performance based).

Sequence
Use a predetermined plan to organize information being presented to learners, such as, general to specific, easy to difficult. You will find further information on sequencing in both the Design and Develop Modules.

SME
The abbreviation for a subject matter expert — someone thoroughly experienced in a certain topic. At DHS and OHA, this is often a person who has worked in a program area for a long time. When you are designing and developing training, involve your SMEs. They can advise on your activities/examples/materials/expectations so they fit your intended audience(s).

Because of their mastery of their topic, SMEs are frequently expected to do training on their subject. However, because they have not had training as trainers, their sessions may not be as effective as possible. Making training learner-centered can help. Refer to the Assess and Design Modules.

So what?/so that ...
This question and answer are used to clarify the choices you make in your training designs. (If you cannot clearly state your reason for including something in the design, you run a risk that learners may ask themselves, “So what was that about?” “It’s not relevant or I’m confused.” Be able to tell yourself or others “I am including this — concept/activity/quiz — in this segment, “So that ...”
*Example:* “The glossary of terms is included in this manual so that the readers have a quick reference to use so that they can more easily build their training vocabulary so that when they hear or read the terms here or elsewhere they will know their meaning and can make sense of them in their reading and study.”

**Training methods**

There are various ways you can create learning for your audience(s). Your training may be appropriate for classroom presentation or may be better using NetLink or computer-based technology. Many considerations go into choosing the appropriate method for the overall event and for the embedded activities in your training. Study the different methods, approaches and techniques available to you. You will apply different ones to achieve different objectives and training goals. The Design Module has the *DHS and OHA Training Methodologies — Decision Guidelines* and these can help you meet DHS and OHA Training Standards on methods.

“What’s in it for me?”

Adult learners respond better to your training when you have given thought to how it benefits them. (You may have to work harder to determine this when the training is mandatory.) When you can describe the positive changes your training is meant to produce for your learners and they get motivated by this, your task is easier.
Instructional System Design

ADDIE Model and DHS and OHA Training Standards

DHS and OHA Training Standards
In all stages of the training process, trainers are to:

- Incorporate the missions, goals, initiatives and core values of their organization by modeling, mentioning, posting or using them in activities.
- Involve customers, managers, subject matter experts and partners in planning.

(You evaluate during each phase and at the end.)
Instructional System Design ADDIE Model: Module One — Assess

DHS and OHA Training Standards

In the Assess stage of the training process, trainers are to:

- Incorporate the missions, goals, initiatives and core values of their organization by modeling, mentioning, posting or using them in activities.
- Include concepts of diversity and cultural competence in materials and content.
- Involve customers, managers, subject matter experts and partners in planning.
- Conduct an assessment to determine whether training is appropriate and if so, what training methodology is best suited to the need.

(You evaluate during each phase and at the end.)
Conducting the assessment

Effective training begins with an assessment. You use this to clarify the training problem, define goals and objectives, and research the learner’s existing knowledge and skills (KSA’s). You ask the following questions.

Who is my audience and what are their characteristics?
- What are the desired new behaviors?
- What things might get in the way of this training being successful?
- What are my options for delivery?
- What are the online options for this training?
- What is my completion timeline?

To get answers, you must discover the current state of things and get an understanding of the desired state. In training these are called the actual and ideal states. The difference between the two is called the Performance Gap and can be diagramed:

Here is a very simple non-training example. You are driving and see the speed limit is 35 miles an hour (the ideal state). You look at your speed (assess) and see that you are doing 25 miles per hour (the actual state). The 10-mile-per-hour difference is the Performance Gap. You step on the gas and watch the speedometer until it shows the ideal state (35 miles an hour). The action you have taken has closed the gap. In this illustration, the solution was simple, but in training there are many possible causes of and solutions to Performance Gap.

In the Assess stage you ask questions that tell you what the ideal and actual states are so you can design solutions that work. Skipping these questions puts you into a guessing mode where you are assuming what is needed.

A complete training needs assessment has several parts. At DHS and OHA, the characteristics of your audience are the minimum you will need to ask about (or think about if you are already familiar with your learners.) All trainers must be proficient at assessing their learners.

Audience characteristics
- How many people in class?
- What is their current skill and knowledge level?
- What is their educational level?
- What cultural characteristics will be present?
- What attitudes and biases towards work and training could be present?
- What current knowledge, skills and abilities in the subject will they bring?
- How will I have them demonstrate their learning — so I will know the gap is closed?

The answers to these questions will describe the actual state for you. You will need to ask other questions to describe the ideal state. As the DHS and OHA Training Standards point out, you will want to involve the appropriate customers, managers, subject matter experts and/or partners in your investigation.

- Ask about the goals of the training; what does “success” look like?
- What are the KSAs the learners are expected to leave with?
• What constraints are there — if large numbers have to be trained in a short time how will you make that happen?

• How long do you have to produce the training?

• Is this training a good candidate for NetLink or computer-based training?

• How will you evaluate so you know the training you developed achieved the end goals?

When your assessment has thoroughly clarified the Performance Gap, you can write accurate learning objectives that address it.

What you learned in the Assess stage, you then use in the Design stage as you choose learner-centered/performance-based methods, materials, activities and techniques.

You continue to assess, but now your focus is on these design choices to ensure that they meet the DHS and OHA Training Standards and achieve your objectives.
In the Design stage of the training process, trainers are to:

- Incorporate the missions, goals, initiatives and core values of their organization by modeling, mentioning, posting or using them in activities.
- Include concepts of diversity and cultural competence in materials and content.
- Involve customers, managers, subject matter experts and partners in planning.
- Apply Adult Learning Principles to design and delivery that comply with the DHS and OHA Training Standards Manual.
- Select delivery methods using DHS and OHA Training Methodologies — Decision Guidelines.

(You evaluate during each phase and at the end.)
**Creating the design**

Used broadly, “training design” refers to all the elements and actions you do to produce training. (See Resources section for Websites about training elements.)

1. Define training need.
2. Write objectives.
3. Define content. (Write learners’ “have to’s” on sticky notes).
4. Sequence the sticky notes. *(See sequencing schemes below)*
5. Determine the order in which to present the material.
6. Decide on methods/materials based on your objectives.
7. Get together all the things you need.
8. Practice.
9. Do the presentation.
10. Evaluate
11. Recycle (Steps 1-10)

*Sequencing:*
- General to the specific
- Simple to the complex
- Theory to practical

The Design stage deals with learning objectives, assessment instruments, exercises, content, subject matter analysis, lesson planning and materials selection. The Design stage should be systematic and specific. Systematic means you use a logical, orderly method of identifying, developing and evaluating a set of planned methods and activities to achieve your training goals. Specific means you complete each element of your instructional design plan with attention to details.

These are steps used for the Design stage:
- Document your instructional, visual and material design strategy.
- Apply instructional strategies according to what you want your learner to know and be able to do by domain (cognitive, affective, and psychomotor [Bloom’s]).
- Design your methods and materials.
- Apply graphic design. Contact the Office of Communications to assure that your work complies with DHS or OHA Design Standards.

At this stage, ask yourself the following questions.
- What content should you cover?
- In what sequence should the subjects occur?
- How deeply must each subject be covered?
- How will each subject be connected to others?
- What methods will you use to present the subjects?
- What training materials are needed?
- Where will the training happen?
- How will you assess learning progress?
- When will you schedule the training?
- When will the evaluation(s) take place?

Used in a narrow way, design means stage two of the ADDIE model and is a series of decisions. It takes place after you have finished your assessment; you have set your objectives and you have decided on an evaluation strategy. This is a most important stage because what you decide here affects everything else. Remember, it is easier to change the design than to change the entire production once it has been developed.
Learning objectives

Clear, precise objectives are a must for effective training. They are the backbone of all your work. Here are the characteristics of good learning objectives (learner-centered/performance based):

- Clear, precise action words (verbs) are used. *(See Bloom’s Taxonomy.)*
- The learner has no doubt about what action is required.
- Action is intended for the learner’s benefit, not the trainer’s or anyone else’s.
- Performance can be measured. After an attempt is made, it is possible to tell clearly whether or not the objective has been achieved.
- Any other competent instructor can use them.

To write effective learning objectives, you must understand that they focus on what the learner is doing or saying, not on what the trainer is doing or saying.

DHS and OHA use a five-part objective template. *(See in Checklist and Template section)*

- Part one: Time frame
- Part two: Group of learners (audience)
- Part three: Action verb
- Part four: Object of action
- Part five: Measurement (either quantitative or qualitative)

These four parts are written to guide you (and the learners if you share it with them). It would look like this:

“At the end of this activity, each table group will be able to correctly list all the core values.”

The fifth part is written for you – not for the learner. It is the evidence that the learner “got” what you intended. It is what you expect to see the learner do or hear them say.

In the example above, it would look like this:

At the end of this activity, (time frame) each table group (audience) will be able to correctly list (action verb) all the core values (object of action).

As evidenced by each person writing the core values in a list in the packet.

At times, you may want to tell the learners what evidence you will expect of them so they may monitor their own progress toward that goal. In that case you would say or write, “At the end of this module each of you should be able to write a five-part learner objective. I will come around to each table and have you show me the correctly completed template.”

Remember, evidence is what you ask them to show you or to tell you to let you know the objective has been achieved.
Describing what you want to see or hear from the learner is easier if you have an organized list of verbs. Trainers use a tool called Bloom’s Taxonomy for this purpose.

**Bloom’s Taxonomy**

“A taxonomy” is a method of classifying things. Bloom’s Taxonomy classifies levels of learning. You use Bloom’s so you can avoid writing verbs you cannot measure — words like understand and know — rather than measurable words like explain and demonstrate. (You can hear someone explain and see someone demonstrate; you cannot see someone understand.) Measurable verbs are necessary so that you can evaluate success.

Bloom has organized verbs into three domains: knowledge, skills and attitudes.

You need to recognize which domain(s) your training needs to fit. If you are teaching a skill (how to use a computer, how to fill in a form) your objectives need to use verbs from the skills domain. You will also use actions from the knowledge domain so you can determine if they get the “mental” part of the lesson, but be sure you are not spending too much time training them to “know” when the Ideal state is that they will “do.”

Another consideration, if the ideal state is that the learner will do something with a certain attitude — respect, concern, helpfulness — your training objective must be written with verbs from the attitude domain. (Your training will usually have objectives from both the knowledge and skill domain and less frequently from attitude. Your Performance Gap assessment will tell you which is needed.)

---

**Domains of learning**

**Knowledge (cognitive)**
- Learners need to know something
  
  *Example:* State three reasons for denying an application for services.

**Skills (psychomotor)**
- Learners need to be able to do or perform something
  
  *Example:* Remove and replace a computer hard drive.

**Attitude (affective) [sometimes trainers use A for Abilities]**
- Learners need to develop and exhibit a particular attitude about something
  
  *Example:* Demonstrate respect when dealing with an upset client or telephone contact.

The following table shows the cognitive domain (knowledge). Think about the ideal state from your Assess stage and what the learners would be doing or saying if they were actually there. Now look at the bulleted lists in the table and find one that describes the action.

*Example:* In the ideal state the learner would “look at reports and see if there has been an improvement.” The bullet under analysis says the learner can “Note similarities and differences.” This indicates you will be training the learner to analyze, and you choose a verb from the list at the bottom of the analysis cell. The verb “distinguish” fits. You write the objective (using the DHS or OHA template) that says “… will be able to distinguish which reports show improvement.”
### Bloom’s Classification system: cognitive domain

<table>
<thead>
<tr>
<th>Knowledge</th>
<th>Comprehension</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>The learner can:</td>
<td>The learner can:</td>
<td>The learner can:</td>
</tr>
<tr>
<td>• Remember facts</td>
<td>• Demonstrate understanding</td>
<td>• Use what has been learned in a new situation</td>
</tr>
<tr>
<td>• Recall facts</td>
<td>• Change knowledge to another form; i.e. paraphrasing</td>
<td></td>
</tr>
<tr>
<td>• Locate facts</td>
<td>• Interpret; i.e., explain, summarize</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Predict outcomes and effects</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Define</th>
<th>List</th>
<th>Explain</th>
<th>Convert</th>
<th>Change</th>
<th>Show</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recall</td>
<td>Match</td>
<td>Summarize</td>
<td>Infer</td>
<td>Compute</td>
<td>Use</td>
</tr>
<tr>
<td>Describe</td>
<td>Name</td>
<td>Interpret</td>
<td>Translate</td>
<td>Demonstrate</td>
<td>Solve</td>
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<tr>
<td>Identify</td>
<td>Recite</td>
<td>Rewrite</td>
<td>Rearrange</td>
<td>Operate</td>
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<td>Estimate</td>
<td></td>
<td>Estimate</td>
<td>Paraphrase</td>
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<th>Analysis</th>
<th>Synthesis</th>
<th>Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>The learner can:</td>
<td>The learner can:</td>
<td>The learner can:</td>
</tr>
<tr>
<td>• “Take apart” information</td>
<td>• Integrate information, ideas, concepts or skills to form an original conclusion.</td>
<td>• Support a judgment with reason and/or criteria</td>
</tr>
<tr>
<td>to examine or work with</td>
<td></td>
<td>• Judge value for a specific purpose</td>
</tr>
<tr>
<td>the different parts.</td>
<td></td>
<td>• Use a standard of appraisal</td>
</tr>
<tr>
<td>• Understand the</td>
<td></td>
<td>• Make quantitative and qualitative judgments</td>
</tr>
<tr>
<td>organization and</td>
<td></td>
<td>Justify Appraise</td>
</tr>
<tr>
<td>relationship of its parts.</td>
<td></td>
<td>Criticize</td>
</tr>
<tr>
<td>• Note similarities and</td>
<td></td>
<td>Compare</td>
</tr>
<tr>
<td>differences.</td>
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</tbody>
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<th>Combine</th>
<th>Rearrange</th>
<th>Justify</th>
<th>Appraise</th>
<th>Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakdown</td>
<td>Order</td>
<td>Compile</td>
<td>Plan</td>
<td>Criticize</td>
<td>Conclude</td>
<td></td>
</tr>
<tr>
<td>Subdivide</td>
<td>Categorize</td>
<td>Compose</td>
<td>Produce</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discriminate</td>
<td>Distinguish</td>
<td>Create</td>
<td>Generalize</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Design</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

When writing objectives, involving others as per DHS and OHA standards will give you clearer objectives as you come to agreement about exactly what is expected of the learners.

Part two of the objective (group of learners) has many design implications. You need to know the principles of adult learning, modalities and individual learning styles.
Principles of Adult Learning and Course Design

<table>
<thead>
<tr>
<th>Learning principles</th>
<th>Implications for course design</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The adult is a partner with the instructor in the learning process.</td>
<td>• Participants should actively influence the learning approach.</td>
</tr>
<tr>
<td>• Adults are capable of taking responsibility for their own learning.</td>
<td>• Incorporate self-directed learning activities in the course design.</td>
</tr>
<tr>
<td>• Adult learners gain through two-way communication.</td>
<td>• Avoid over-use of lectures and “talking-to”, emphasize discussion.</td>
</tr>
<tr>
<td>• Adults learn through reflection on their and others’ experience.</td>
<td>• Use interactive methods such as case studies, role-playing, and so forth.</td>
</tr>
<tr>
<td>• Adults learn what they perceive to be useful in their life situations.</td>
<td>• Make the content and materials closely fit assessed needs.</td>
</tr>
<tr>
<td>• Adults’ attention spans are a function of their interest in the experience.</td>
<td>• Allow plenty of time to “process” the learning activities.</td>
</tr>
<tr>
<td>• Adults are most receptive to instruction that is clearly related to problems they face daily.</td>
<td>• Promote giving inquiry into problems and affirm the experience of participants.</td>
</tr>
<tr>
<td>• Adults do not typically see themselves as learners.</td>
<td>• Give participants a rationale for becoming involved and provide opportunities for success.</td>
</tr>
<tr>
<td>• Adults learn better in a climate that is informal and personal.</td>
<td>• Promote getting acquainted and interpersonal linkages.</td>
</tr>
<tr>
<td>• Adult learners apply learning that they have been influential in planning.</td>
<td>• Diagnose and prioritize learning needs and preferences during the course as well as before.</td>
</tr>
<tr>
<td>• Adults learn when they feel supported in experimenting with new ideas and skills.</td>
<td>• Use learning groups as home bases for participants.</td>
</tr>
<tr>
<td>• Adults are likely to have somewhat fixed points of view that make them closed to new ways of thinking and behaving.</td>
<td>• Include interpersonal feedback exercises and opportunities to experiment.</td>
</tr>
<tr>
<td>• Adults learn to react to differential status of members of the group.</td>
<td>• Use subgroups to provide safety and readiness to engage in open interchange.</td>
</tr>
<tr>
<td>• Adults are internally motivated to develop increased effectiveness.</td>
<td>• Make all learner evaluation self-directed.</td>
</tr>
<tr>
<td>• Adults filter their learning through their value systems.</td>
<td>• Provide activities that focus on cognitive, affective, and behavioral change.</td>
</tr>
</tbody>
</table>

By John E. Jones & Michael Woodcock, The New Fieldbook for Training


**Learning modalities**

There are three learning “modalities”: visual, auditory, and kinesthetic (movement) — VAK. Learners use all three but show a preference for at least one of the three.

Your training design should include actions that satisfy all three during the training. Visual learners will respond to color and symbols; for those with auditory preference, have learners read out loud from time to time or allow silent reading time. Encourage note-taking and highlighting to create quiet movement and put toys out for people to manipulate for kinesthetic learners. These actions will help learners retain information. Be aware that your training will be strongly influenced by your own mode preference so you must consciously design the other modes into it.

These three modalities may reflect the learners’ learning styles, which research indicates comes from how the brain works.

**Gregorc learning styles**

Anthony Gregorc based his learning styles on brain hemisphere research. The learning styles measured by the Gregorc Style Delineator fall on a continuum rather than being polar extremes. Therefore, you do not have to use four very different approaches, because there is overlap.

The style represents two types of preferences:

- **Perceptual preference**
  - abstract (reason and intuition)
  - concrete (the senses)
- **Ordering preference**
  - sequential (linear)
  - random

Combining these leads to four types of learners:

**Concrete sequential learner**

These learners prefer direct, hands-on activities, haptic (tactile) methods, step-by-step instructions, and real life examples.

Instructional methods: workbooks with detailed instructions, diagrams, flow charts, computer-assisted instruction, documentation and hands-on activities.

**Concrete random learner**

These learners prefer a trial-and-error approach, with breakthroughs through intuitive insight. They like a stimulus-rich environment. They thrive on competition, especially if they can use their wits. These learners rarely accept anything on outside authority. They are implementers of change and tend to be impulsive. They don’t like to read directions and dislike structure.

Instructional methods: independent study, computer games and simulations, multimedia, and “playing” with software.

**Abstract sequential learner**

These learners prefer a highly verbal, logical and analytical approach based on intellect. Their motto is “knowledge is power.” They like solitude, prefer well-organized material, and are highly skeptical. They have trouble picking up subtle nonverbal cues and dislike distractions. They will accept change only after much deliberation. They like written, verbal, and visual instruction.

Instructional methods: lectures, reading, outlines, conducting Internet searches, e-mail, listservs, and audiotapes. Abstract sequential learners may enjoy searching the Internet for information as well as asynchronous communication because they have time to think about their responses.
Abstract random learner
These learners like to focus on relationships and their emotions. They respond to visual methods of instruction, group discussion, and time for reflection. They may be uncomfortable with distance education because it does not include the emotional involvement of meeting face to face, unless the instructor is careful to build rapport as part of the learning experience. They enjoy evaluating personal experiences.

Instructional methods: video clips, group discussion, videoconferencing, television, case studies, chatrooms and guest speakers.

One study found that students with an abstract-random style did poorly on computer-assisted instruction, which is characterized by self-paced learning. Students with a sequential style did better. The researchers concluded that computer-mediated learning may be difficult for some students. (See Ross, J. & Schulz, R. [1999]. Can computer-aided instruction accommodate all learners equally? British Journal of Educational Technology, 30 [10], p. 5-24.)

Such results show why you need to give serious consideration to the training methods you choose. Using the DHS and OHA Training Methodologies — Decision Guidelines will help you compare the strengths and challenges of various methods and are included in this manual so trainers can create effective training that complies with the DHS and OHA Training Standards.

It is much easier to change your design before you go to the Develop stage and commit time and resources (materials) to it.

Before you begin developing, have your SMEs and other “advisors” review your training with you. Consider selecting a small group to do the proposed activities or lessons and get their feedback. If the results are not what you intended, you can make modifications that close your Performance Gap more effectively.

DHS and OHA Training Standards direct trainers to involve others because the insight that comes out of these feedback sessions turns good ideas into great ones. The next ADDIE stage, Develop, tells how you turn the design into reality.
Instructional System Design ADDIE Model:
Module Three — Develop

DHS and OHA Training Standards

In the Develop stage of the training process, trainers are to:

- Missions, goals, initiatives and core values of their organization by modeling, mentioning, posting or using them in activities.
- Include concepts of diversity and cultural competence in materials and content.
- Involve customers, managers, subject matter experts and partners in planning.
- Develop training that incorporates industry standards such as Benjamin Bloom’s Taxonomy and Robert Mager’s Performance Model to create learning objectives, lesson plans and training methods.
- Produce materials that are relevant, legible, of a reading level appropriate to the intended audience and that comply with the DHS Style Manual or OHA Style Manual.
- In the Develop stage, you bring your design decisions into being. You produce the lesson plan or storyboard, write content and choose graphics. (When e-learning is involved, you work with programmers.) You conduct one or more pilot sessions or do usability tests (for e-learning). You evaluate the project with SMEs and/or others and revise as needed.
Development steps

On the Don Clark website, you find that these are the steps that get repeated for each “learning event.” The event may be a single activity or a module or lesson. Each experience the trainer creates for the learner must include these actions. They are similar to those for the entire training design, but address smaller “chunks” of the learning.

1. What is the purpose (learning goals) of the training?
2. Write objectives. (See template in this manual.)
3. Write “learner have to”s on Post-it Notes.
4. Sequence Post-Its using an appropriate scheme (see following pages).
5. Match methods to objectives. (See methodology pages in this manual.)
6. Transfer to lesson plan. (See template in this manual.)

Develop lesson plans

Here are characteristics that make a lesson plan useful to you and to another trainer who might co-train the class or be called on to fill in when the usual trainer is absent. A complete lesson plan:

- Clearly outlines the order and sequence of events;
- Provides and explains strategies for difficult areas of the lesson;
- Is type-written;
- Includes training objectives and overall training goal;
- Describes when and how training packet contents are used;
- Lists training equipment needed for the lesson;
- Provides transitions between different parts of the lesson;
- Lists likely answers that come up for questions posed in the lesson plan;
- Gives discussion-generating questions to be suggested to group as needed.

The following lesson plan illustrates the template used by many trainers in DHS and OHA. (The blank template is in the Checklists and Templates section of this manual.) The lesson it describes is from the second day of the Train the Trainer course conducted by the Organization and Employee Development Services and is called the Reboot.
Lesson plan: example of completed plan

<table>
<thead>
<tr>
<th>SUBJECT: <strong>Train the Trainer</strong></th>
<th>LESSON TITLE: <strong>Reboot 2nd day</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>LENGTH OF CLASS: <strong>30 min.</strong></td>
<td>PREPARED BY: <strong>Xzy (trainer initials)</strong></td>
</tr>
</tbody>
</table>

**LESSON OBJECTIVES:**

*By the end of this reboot, participants will be able to recall facts, techniques and other information from the first day of training as evidenced by writing quiz questions and answers on that subject matter.*

**LESSON REFERENCES:**

*Day one material*

**INSTRUCTIONAL AIDS**

*Paper for writing quiz questions.*

**TYPE OF PRESENTATION:**  
*Interactive*

**SPACE REQUIRED:**  
*Classroom*

**SPECIAL CONSIDERATIONS:**

*Open book is OK.*
**Lesson plan outline**

<table>
<thead>
<tr>
<th>LESSON: <strong>Reboot Day 2</strong></th>
<th>Cues</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Review the first day’s agenda (use prepared flip outline) and preview this day’s agenda.</td>
<td>Refer to agenda on flip.</td>
</tr>
<tr>
<td>• Ad-lib your way into the reboot activity...</td>
<td>Give instructions; individual work.</td>
</tr>
<tr>
<td>• Have each person write out two quiz questions and their answers based on the material covered in Day 1. Open book is perfectly acceptable.</td>
<td>Trainer selects 10 of their questions.</td>
</tr>
<tr>
<td>• Use a separate piece of paper for each question and answer.</td>
<td>Do a verbal quiz</td>
</tr>
<tr>
<td>• Trainer note: the questions they come up with will be ones on topics that mattered to them; this is Cooperative Learning and also individual accountability; you gain a sense of how well you taught on day one; you avoid having to write the quiz yourself; and class experiences a new trainer technique.</td>
<td></td>
</tr>
<tr>
<td>• These questions will be used to “test” their classmates ... no pre-quiz sharing. They are not to share with their table group.</td>
<td></td>
</tr>
<tr>
<td>• They hand the completed Q&amp;A’s in to the trainer. Trainer selects 10 Q&amp;A’s to ask the group. Select a variety; if there are a lot of repeats on a topic — use at least one of these questions as it represents what was important to the group; select a variety of types: T/F, multiple choice, fill-in-the-blank; avoid essay questions; avoid questions that have no easy answer.</td>
<td></td>
</tr>
<tr>
<td>• Give positive feedback to the group for the great questions written and explain that there is only time to go over 10 of them. Explain that trainer may change the wording a bit to ensure clarity, but essentially these questions will represent what was important to the group.</td>
<td></td>
</tr>
<tr>
<td>• Ask everyone to get a piece of paper and write down the answers to the questions as you ask them. Then verbally ask each question you selected (assign a number to each one) and allow time for participants to write down their answers.</td>
<td></td>
</tr>
<tr>
<td>• Go over the answers; congratulate them on a job well done and proclaim the class officially rebooted.</td>
<td></td>
</tr>
</tbody>
</table>
Develop content

What to include as content depends on what KSAs you expect the learner to get so that the objective you set in the Assess stage is met. Once you decide what to include you ask for each part:

- Is this essential to achieve my objective?
- Does the learner need certain foundation KSAs to learn this part?
- How can I make this as relevant (adult learning principle) as possible?
- What will make this understandable — illustrations, personal stories and such?
- How should the chunks be sequenced so the learner can make sense of this?

Here are some approaches to sequencing your content. You will probably develop more on your own as you work with the topics you train.

Sort information into its appropriate category:

- Rules and regulations
- Procedures
- Functions/operations
- Policies
- Facts
- Examples
- Definitions

Lay the groundwork; teach prerequisites.

- Teach most important and frequently used concepts/tasks first.
- Teach the general, then the specific.
- Teach rules before exceptions.
- Progress from the simple to the complex.
- Teach similar and potentially confusing concepts/tasks together, emphasizing the aspects that make them different.
- Teach small portions of a long set of procedures at a time; provide many practice opportunities.
- Teach tasks and procedures in the sequence in which they occur on the job.
Develop learner materials

All your materials must be relevant and legible and show cultural competence. The reading level should be appropriate to the audience. For questions of proper punctuation and other publishing considerations refer to the online DHS Style Manual or OHA Style Manual.

You need to be proficient at managing the materials you use. If you are not smooth with your equipment, practice with it. Rehearsal is always a good idea, particularly if you can do it at your training site.

Training materials include such items as:

- Handouts
- PowerPoint slides
- Flip charts
- Posters
- Video
- Music

The DHS and OHA Training Standards say that all printed materials must conform to the DHS Style Manual or OHA Style Manual. Also, there are certain “looks” designed for the various DHS and OHA programs; Communications staff can tell you if your materials require editing.

Develop evaluations

Keep in mind three evaluations when creating training:

1. How can you evaluate whether learners are succeeding at the training tasks?
2. How successful was the training event?
3. How well did the entire program achieve the desired training goals?

You may use projects, tests, evaluation sheets, questionnaires, surveys or interviews to measure success. You develop your evaluations at this stage because your plans give you focus. When you know how you will measure success, you can recognize whether what you are developing is taking you toward that success.

DHS and OHA standards require that you do at least a level-one evaluation (learner reaction) at every training you do.
Instructional System Design ADDIE Model:
Module Four — Implement

DHS and OHA Training Standards
In the Implement stage of the training process, trainers are to:

- Incorporate the missions, goals, initiatives and core values of their organization by modeling, mentioning, posting or using them in activities.
- Involve customers, managers, subject matter experts and partners in planning.
- Select delivery methods using DHS and OHA Training Methodologies — Decision Guidelines.
- Present training: facilitate/question/give feedback, conduct learner-centered activities that promote retention and transfer of knowledge/skills, and manage the classroom.

Implement is the fourth stage of the ADDIE model. This is where the solutions you created in the Design stage get put into action.

It includes all the steps necessary to “get the training out there”—you do the pilot, revise as necessary, schedule rooms and presenters, post classes to the Learning Center, arrange for equipment and transportation, do the roll out and conduct the training, consider evaluations and make adjustments. (See the checklists in Checklists and Templates section.)

This is also the stage where you ensure that the packets, equipment, tools, supplies and video items are in place.
Presenting training

Presentation is much more than giving learners your content. To be a competent presenter, (and meet DHS and OHA Training Standards) you must be able to: facilitate, question, give feedback, conduct learner-centered activities, manage the classroom, and evaluate learner retention and transfer of knowledge/skills/attitudes.

It is at this stage that you can really show the first two DHS and OHA Training Standards. If you want to get or sharpen your presentation skills, you could sign up for the Train the Trainer class conducted by Organization and Employee Development Services or join a Toastmasters group.

The book, “Telling Ain’t Training” will give you interesting ideas on how to deliver content so that your learners will grasp and remember it. (See Resources section.)

Here are elements you should include in your presentation.

Opening
• Introduce yourself and participants.
• Set the context by giving the reason for the training.
• Tell what the objectives are.
• Do a warm-up exercise to help learners feel comfortable talking to each other.

For each training segment
• Introduce the topic and tell what makes it relevant (use your So That’s).
• Show and Tell (in Cooperative Learning, learners will be showing and telling too).
• Have learners apply the content and practice if appropriate.
• Clarify by answering questions, giving feedback, discussing results.
• Evaluate success through questions, tests or learner self-assessment (you made this choice in the Design stage).
• Review and do the transition to whatever follows.

Closing
• Give an overall summary to recall and reinforce the learning experience.
• Do any final testing or evaluation.
• Ask learners to set a goal with a time frame of how they will apply the learning.
DHS and OHA Training Standards

In the Evaluate stage of the training process, trainers are to:

- Incorporate the missions, goals, initiatives and core values of their organization by modeling, mentioning, posting or using them in activities.
- Involve customers, managers, subject matter experts and partners in planning.
- Evaluate training at the appropriate level(s) outlined in the DHS and OHA Training Standards Manual (based on the work of Donald Kirkpatrick).

(You evaluate during each stage and at the end.)
Evaluate

The Evaluate stage consists of two parts: formative and summative. Formative evaluation should happen in each stage of the ADDIE process. You evaluate how well your work achieved what you intended — was your assessment on target, does the design meet the need, do the materials work and so on.

Summative evaluation takes place at the end of the process. Its results show whether after being trained, the learners’ KSAs match what was described as ideal in the Assess stage — did the training get the job done?

The DHS and OHA standard for training evaluation is the Kirkpatrick model. (See the Resources section for book title and publisher.) The following is a “nutshell” overview of Kirkpatrick’s four levels.

Which level to use? The higher the level, the more time and effort are required. Levels 1 and 2 are generally within the scope and ability of trainers at DHS and OHA.

**Level 1 – Reaction**
How well did the learners like the experience?

**Level 2 – Learning**
How much did the learners improve in KSAs?
If possible, learners take a pre-test as well as the post test.

**Level 3 – Transfer**
Are the learners using the new KSAs back at their workplaces?

**Level 4 – Results**
Did the training result in a positive change — lowered costs, fewer absences or other business measures — for the organization?

The following article appears on the Web. Its author makes the model easy to understand.

**Kirkpatrick’s Four Levels of Evaluation**

In Kirkpatrick’s four-level model, each successive evaluation level is built on information provided by the lower level.

Assessing training effectiveness often entails using the four-level model developed by Donald Kirkpatrick. According to this model, evaluation should always begin with level one, and then, as time and budget allows, should move sequentially through levels two, three, and four. Information from each prior level serves as a base for the next level’s evaluation. Thus, each successive level represents a more precise measure of the effectiveness of the training program, but at the same time requires a more rigorous and time-consuming analysis.

**Level 1 Evaluation – Reactions**
Just as the word implies, evaluation at this level measures how participants in a training program react to it. It attempts to answer questions regarding the participants’ perceptions — Did
they like it? Was the material relevant to their work? This type of evaluation is often called a “smilesheet.” According to Kirkpatrick, every program should at least be evaluated at this level to provide for the improvement of a training program. In addition, the participants’ reactions have important consequences for learning (level two). Although a positive reaction does not guarantee learning, a negative reaction almost certainly reduces its possibility.

**Level 2 Evaluation – Learning**
To assess the amount of learning that has occurred due to a training program, level two evaluations often use tests conducted before training (pretest) and after training (post test).

Assessing at this level moves the evaluation beyond learner satisfaction and attempts to assess the extent students have advanced in skills, knowledge, or attitude. Measurement at this level is more difficult and laborious than level one. Methods range from formal to informal testing to team assessment and self-assessment. If possible, participants take the test or assessment before the training (pretest) and after training (post test) to determine the amount of learning that has occurred.

**Level 3 Evaluation – Transfer**
This level measures the transfer that has occurred in learners’ behavior due to the training program. Evaluating at this level attempts to answer the question—Are the newly acquired skills, knowledge, or attitude being used in the everyday environment of the learner? For many trainers this level represents the truest assessment of a program’s effectiveness. However, measuring at this level is difficult as it is often impossible to predict when the change in behavior will occur, and thus requires important decisions in terms of when to evaluate, how often to evaluate and how to evaluate.

**Level 4 Evaluation – Results**
Level four evaluation attempts to assess training in terms of business results. In this case, sales transactions improved steadily after training for sales staff occurred in April 1997.

Frequently thought of as the bottom line, this level measures the success of the program in terms that managers and executives can understand — increased production, improved quality, decreased costs, reduced frequency of accidents, increased sales, and even higher profits or return on investment. From a business and organizational perspective, this is the overall reason for a training program, yet level four results are not typically addressed. Determining results in financial terms is
difficult to measure, and is hard to link directly with training.

**Methods for long-term evaluation**

- Send post-training surveys
- Offer ongoing, sequenced training and coaching over a period of time
- Conduct follow-up needs assessment
- Check metrics (e.g., scrap, re-work, errors, etc.) to measure if participants achieved training objectives
- Interview trainees and their managers, or their customer groups (e.g., patients, other departmental staff)

Being able to evaluate your training is a competency all trainers should have. By assessing each stage and the final (summative) outcome, your training can become more and more effective at closing Performance Gaps.

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Overarching principles

All training methods have benefits and disadvantages. You need to give strong consideration to several factors that balance training needs and expected outcomes with logistics and available resources.

- You develop the training in partnership with those requesting the training.
- Curriculum developer and/or subject matter expert help decide the most appropriate method to present the information to the audience.
- You consult the DHS and OHA Training Methodologies — Decision Guidelines for training design and delivery.
- You create your evaluation plan early in the training-design process.

Considerations for selecting methodology

To make the best use of training resources, considerations, including cost, must be weighed when designing and planning training and selecting delivery methods.

- Audience need, subject matter, objectives
- Timing for the training
- Volume of training that will be needed
- Audience work location
- Time away from worksite
- Workload impact on those in office
- Support required to transfer learning to job
- Trainers
- Materials, preparation and production
- Training locations
- Room and equipment rentals
- Per-diem or costs associated with attending training
- Cost of hiring someone to prepare training
- Cost of purchasing and customizing ready-designed materials
- Cost of staff NOT knowing the information they would learn in the course
- Cost of using blended approach to training
- Learner preparation for new methods
- Extent to which topic is sensitive and will require one method over another as a result
- Cost of equipment for electronic training such as computer hardware, software and set-up, headphones, servers, site rental
Methodologies

Choose from the following:

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Opportunity/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Need for observation in class setting</td>
<td>• Flexibility in structure</td>
<td>• Train-the-trainer cost</td>
</tr>
<tr>
<td>• Skill development</td>
<td>• Provides learners time to interact with other learners and instructor</td>
<td>• Adult learning principle consideration (some audience members “learn best” in classroom setting)</td>
</tr>
<tr>
<td>• Interviewing Skills</td>
<td>• Worker is away from work-site and can concentrate on learning</td>
<td>• Resources, such as classrooms</td>
</tr>
<tr>
<td>• Team Building</td>
<td>• Helps break down barriers between divisions</td>
<td>• Takes time to create good training materials</td>
</tr>
<tr>
<td>• Facilitation</td>
<td></td>
<td>• Supervisors may ask that learner maintain contact with daily work (receive phone calls, attend hearings, etc.)</td>
</tr>
<tr>
<td>• Diversity training</td>
<td></td>
<td>• Accessible classrooms</td>
</tr>
<tr>
<td>• Need for small- or large-group discussions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• In depth policy based training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Computer related training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Discussion of culture or philosophy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## NetLink Training (Instructor-led / online class)

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Opportunity/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Information sharing</td>
<td>• Can measure objectives and/or performance</td>
<td>• Technical or keyboard training</td>
</tr>
<tr>
<td>• Policy-related training</td>
<td>• Ability to “test” participant</td>
<td>• Length of time to hold training</td>
</tr>
<tr>
<td>• When audience is dispersed</td>
<td>• Real-time</td>
<td>• Limited by licenses (75-100)</td>
</tr>
<tr>
<td>• When performance observation is not required</td>
<td>• Very interactive</td>
<td>• Keep trainings to small groups</td>
</tr>
<tr>
<td>• Large group information disbursement</td>
<td>• Reduces travel costs</td>
<td>• Resources to support NetLink: licenses, staff time to develop; technical expert for studio</td>
</tr>
<tr>
<td>• Small group trainings (5-10 people)</td>
<td>• Instant feedback to questions</td>
<td>• Need to provide protected time for learner on-site</td>
</tr>
<tr>
<td>• Blended learning situation</td>
<td>• Expert led</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Learning is very focused</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Retention is better</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Can see the desktop for computer application training (application sharing)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• DHS and OHA have established best practices for NetLink delivery</td>
<td></td>
</tr>
</tbody>
</table>
## Computer-based (self-guided) training

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Opportunity/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Content is fairly static</td>
<td>• Always available</td>
<td>• Team based development—subject matter expert, e-learning software, graphics, instructional design</td>
</tr>
<tr>
<td>• Simulations</td>
<td>• Repeatable</td>
<td>• Development cost can be considerable if you require media-rich content</td>
</tr>
<tr>
<td>• Audience is dispersed</td>
<td>• Everyone has same message - consistency</td>
<td>• Learner motivation varies for online instruction</td>
</tr>
<tr>
<td>• Performance that requires practice or verification</td>
<td>• Easier to keep users updated with current information</td>
<td>• If you need to observe the performers</td>
</tr>
<tr>
<td>• Pre-work to a classroom</td>
<td>• Reduce travel costs</td>
<td>• Real-time knowledge sharing</td>
</tr>
<tr>
<td>• Performers who can schedule their own time</td>
<td></td>
<td>• Need to provide learner with protected time to complete training.</td>
</tr>
<tr>
<td>• Remediation</td>
<td></td>
<td>• Need for resources to answer questions (i.e., “lifelines”).</td>
</tr>
<tr>
<td>• High turnover</td>
<td></td>
<td>• Resistance to non-classroom training</td>
</tr>
<tr>
<td>• Need to reach a wide audience at once or quickly</td>
<td></td>
<td>• Managing expectation that most training can be done on-line.</td>
</tr>
</tbody>
</table>
### Learning Collaboration Tools – Social Media, Discussion Threads and E-mail

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Opportunity/Challenges</th>
</tr>
</thead>
</table>
| • Pre-work and follow-up questions  
• Need to share information and answers to questions—very interactive for those who participate  
• Learning tasks or assignments for individual or group work | • Learning Center, GovSpace and Outlook can support it  
• Quick  
• Allows the worker to schedule their participation  
• Easy to implement  
• Connects the participants in that they learn from each other  
• Reduce travel cost | • Motivation  
• Creation maintenance of user lists  
• Overuse of e-mail for all their work—doesn’t ensure they will use it  
• Need a host or moderator (for discussion threads or e-mails that demand a response)  
• Can get off topic  
• Need capacity building to develop instructors skill at purposeful development of blended learning techniques  
• Coaching for end-users |
# Video conference training

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Opportunity/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Effective for meetings</td>
<td>• Visual media; easier to understand parties (rather than computer-based or telephone-based training)</td>
<td>• Sharing documents is challenging</td>
</tr>
<tr>
<td>• Information dumps</td>
<td>• Can use existing equipment, i.e., in DHS and OHA offices, at schools, community colleges, DOJ, etc.</td>
<td>• Scheduling, coordination</td>
</tr>
<tr>
<td>• Case staffings</td>
<td>• Reduces travel costs</td>
<td>• Compatibility between various systems and equipment</td>
</tr>
<tr>
<td>• Technical assistance</td>
<td>• Can show videos and docs</td>
<td>• Local coordination</td>
</tr>
</tbody>
</table>

- Sharing documents is challenging
- Scheduling, coordination
- Compatibility between various systems and equipment
- Local coordination
- Resources for technical support
- Best use of camera techniques
- Displaying documents
## Conferences

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Opportunity/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Need for getting a lot of information out in short amount of time</td>
<td>• Staff have ability to work with other professionals</td>
<td>• Scheduling</td>
</tr>
<tr>
<td>• Strengthen practice</td>
<td>• Hosting large groups</td>
<td>• Cost</td>
</tr>
<tr>
<td>• Networking/building community of practice</td>
<td>• Able to have many topics covered in one venue</td>
<td>• Appearance/political issues</td>
</tr>
<tr>
<td>• New policy/practice</td>
<td></td>
<td>• Travel expense</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Resources for online and onsite Registration</td>
</tr>
</tbody>
</table>
### Outside vendors

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Opportunity/Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Consistent ongoing training to be delivered</td>
<td>- Flexible</td>
<td>- Keeping materials and organization messages updated and fresh</td>
</tr>
<tr>
<td>- Staffing resources not sufficient to keep in-house</td>
<td>- Credibility</td>
<td>- Cost</td>
</tr>
<tr>
<td>- Core or initial training for staff</td>
<td>- Often training already exists, no need to develop in-house</td>
<td>- Ensuring that training truly meets the current needs of the department</td>
</tr>
<tr>
<td></td>
<td>- Development of training in a short amount of time</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Capacity building: Can contract for train-the-trainer and DHS or OHA ownership of materials</td>
<td></td>
</tr>
</tbody>
</table>
## Mentoring and on-the-job training

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Increase individual employee and/or supervisor goals, skills, abilities, awareness</td>
<td>• Evidence that it works: retention, advancement, job skill development</td>
<td>• Needs staff/resource support to sustain</td>
</tr>
<tr>
<td>• Directed retention/advancement efforts</td>
<td>• Low cost</td>
<td>• Staff time commitment</td>
</tr>
<tr>
<td>• Team building</td>
<td>• Limited travel/time</td>
<td>• Difficult to track</td>
</tr>
<tr>
<td>• Management development</td>
<td>• Local control</td>
<td>• Outcomes are a challenge to measure</td>
</tr>
<tr>
<td>• Peer-to-peer support</td>
<td>• Ties easily to an Employee Development Plan</td>
<td>• Not effective format for all learning needed</td>
</tr>
<tr>
<td>• Career development</td>
<td>• Combines a number of delivery methods</td>
<td>• Difficult to control quality</td>
</tr>
<tr>
<td>• Specific skill (short-term)</td>
<td>• Focused on specific task</td>
<td>• Accuracy of program-related materials</td>
</tr>
<tr>
<td>• Succession planning</td>
<td>• Office culture/politics considered</td>
<td>• Time/resource necessary for one-on-one coaching</td>
</tr>
<tr>
<td></td>
<td>• Ability to work with real situations</td>
<td></td>
</tr>
</tbody>
</table>
## In-service or brown bag

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Policy/procedure – local office or program related, or shared services</td>
<td>• Low cost</td>
<td>• Difficult to control quality</td>
</tr>
<tr>
<td>• Team building</td>
<td>• Limited staff time</td>
<td>• Quality range significant</td>
</tr>
<tr>
<td>• Diversity Awareness</td>
<td>• Local control</td>
<td>• Perception that it isn’t worthwhile</td>
</tr>
<tr>
<td>• Management development</td>
<td>• Developmental for provider of in service</td>
<td>• Long-term outcomes could be difficult to measure</td>
</tr>
<tr>
<td>• Stakeholder/focus group activities</td>
<td>• Could use Learning Center to track</td>
<td></td>
</tr>
<tr>
<td>• Efforts to increase partnerships</td>
<td>• Outcome could be immediate and easily measured</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Supports self-directed learning and agency value re: continuous learning</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Promotes team work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Could promote cross-team work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Resource for Leadership Model implementation</td>
<td></td>
</tr>
</tbody>
</table>
## Technical assistance

<table>
<thead>
<tr>
<th>Optimal Use</th>
<th>Strength</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>• OIS</td>
<td>• Evidence that this is most effective way to change practice/system&lt;br&gt;• All methodologies could be part of delivery&lt;br&gt;• Local control&lt;br&gt;• Specific need addressed&lt;br&gt;• Outcomes could be measured&lt;br&gt;• Individual and system change can be implemented</td>
<td>• Cost can be considerable, if provided by outside contractors&lt;br&gt;• Cost to measure outcomes could be considerable&lt;br&gt;• Staff time and perception</td>
</tr>
<tr>
<td>• Systems implementation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Introduction of evidence-based practices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Service delivery initiatives&lt;br&gt;Information sharing on new policy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• QA on policy or procedures</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Case management consultation for individuals or work teams</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Resources

The following Web sites and book titles are included for your further assistance.

Websites

All printed materials must conform to the Office of Communications’ DHS Style Manual at this site.

Printed materials also need to conform to the Office of Communications’ Publications Design Guide at this site.
[https://inside.dhsoha.state.or.us/images/stories/asd/pubs-design/docs/ssstyleguide_2.4.pdf](https://inside.dhsoha.state.or.us/images/stories/asd/pubs-design/docs/ssstyleguide_2.4.pdf)

This site covers all parts of training. It has a strange name, but is well organized and thorough.

This site covers objective writing based on Mager’s work.
[www2.gsu.edu/~mstmbs/CrsTools/Magerobj.html](http://www2.gsu.edu/~mstmbs/CrsTools/Magerobj.html)

This presents the four levels of evaluation.

In addition to the information found on the above Don Clark site, there are various websites that present Kirkpatrick’s work; in your search bar type “Kirkpatrick + four levels.”

ASTD (American Society for Training & Development) is the world’s largest association dedicated to workplace learning and performance professionals. This site has job listings and other professional development information.
[www.astd.org/](http://www.astd.org/)

International Board of Standards of Training, Performance and Instruction. This site lists competencies and other professional development information.
[www.ibstpi.org](http://www.ibstpi.org)

Books

Assessment

Evaluation
Donald L. Kirkpatrick and James D. Kirkpatrick, Evaluating Training Programs, The Four Levels, Berrett-Koehler Publishers

Training
Harold D. Stolovitch, Erica. J. Keeps, Telling Ain’t Training, ASTD Press.

Dr. Robert Mager
Numerous books, including:

- How to Turn Learners On … Without Turning Them Off
- Preparing Instructional Objectives: A Critical Tool in the Development of Effective Instruction
For further information or support contact
Organization and Employee Development
Services at 503-947-5457 and you will be referred
to a Training and Development Specialist 2 who
will be happy to help you.
Checklists and Templates

Robert Mager’s Performance Model

Performance Analysis

1 Adapted from Analyzing Performance Problems, Second Edition, by Robert Mager and Peter Pip. 1984
## Principles of Adult Learning and Course Design

<table>
<thead>
<tr>
<th>Learning Principles</th>
<th>Implications for Course Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The adult is a partner with the instructor in the learning process.</td>
<td>• Participants should actively influence the learning approach.</td>
</tr>
<tr>
<td>• Adults are capable of taking responsibility for their own learning.</td>
<td>• Incorporate self-directed learning activities in the course design.</td>
</tr>
<tr>
<td>• Adult learners gain through two-way communication.</td>
<td>• Avoid over-use of lectures and “talking-to”, emphasize discussion.</td>
</tr>
<tr>
<td>• Adults learn through reflection on their and others’ experience.</td>
<td>• Use interactive methods such as case studies, role-playing, and so forth.</td>
</tr>
<tr>
<td>• Adults learn what they perceive to be useful in their life situations.</td>
<td>• Make the content and materials closely fit assessed needs.</td>
</tr>
<tr>
<td>• Adults’ attention spans are a function of their interest in the experience.</td>
<td>• Allow plenty of time to “process” the learning activities.</td>
</tr>
<tr>
<td>• Adults are most receptive to instruction that is clearly related to problems they face daily.</td>
<td>• Promote giving inquiry into problems and affirm the experience of participants.</td>
</tr>
<tr>
<td>• Adults do not typically see themselves as learners.</td>
<td>• Give participants a rationale for becoming involved and provide opportunities for success.</td>
</tr>
<tr>
<td>• Adults learn better in a climate that is informal and personal.</td>
<td>• Promote getting acquainted and interpersonal linkages.</td>
</tr>
<tr>
<td>• Adult learners apply learning that they have been influential in planning.</td>
<td>• Diagnose and prioritize learning needs and preferences during the course as well as before.</td>
</tr>
<tr>
<td>• Adults learn when they feel supported in experimenting with new ideas and skills.</td>
<td>• Use learning groups as home bases for participants.</td>
</tr>
<tr>
<td>• Adults are likely to have somewhat fixed points of view that make them closed to new ways of thinking and behaving.</td>
<td>• Include interpersonal feedback exercises and opportunities to experiment.</td>
</tr>
<tr>
<td>• Adults learn to react to differential status of members of the group.</td>
<td>• Use subgroups to provide safety and readiness to engage in open interchange.</td>
</tr>
<tr>
<td>• Adults are internally motivated to develop increased effectiveness.</td>
<td>• Make all learner evaluation self-directed.</td>
</tr>
<tr>
<td>• Adults filter their learning through their value systems.</td>
<td>• Provide activities that focus on cognitive, affective, and behavioral change.</td>
</tr>
</tbody>
</table>

By John E. Jones & Michael Woodcock, The New Fieldbook for Training
Check Sheet — All steps

- Define training need.
- Describe the Performance Gap.
- Decide on evaluation plan.
- Write objectives.
- Define your content.
- Organize the order in which to present the material.
- Decide on methods/materials.
- Get your “stuff” together. (Schedule adequate photocopying time.)

- **Practice.**
- Do the presentation.
- Do final evaluation.
- Recycle (Step 1).
Delivery Plan Checklist

Use this checklist as an aid to check the completeness of your delivery plan.

<table>
<thead>
<tr>
<th>Task</th>
<th>yes</th>
<th>no</th>
<th>*n/a</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are your introductory remarks to orient the trainees to the subject in general included?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are housekeeping remarks included?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is there an introductory activity that involves the trainees (e.g., trainee introductions)?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you included the main points and activities for each section?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you included the instructions for your training activities?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you included specific questions or comments at the points where you wish to make them?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are summary and transition comments included between sections?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are training aids referenced at the point where you will use them?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you included an overall summary and your closing remarks?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the time allotted for each major section?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do the allotted times add up to the total time available?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have you included a training evaluation?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Not applicable
Lesson Plan Checklist

My lesson plan:

☑ Clearly outlines the order and sequence of events.

☑ Provides and explains strategies for difficult areas of the lesson.

☑ Is type-written.

☑ Includes training objectives and overall training goal.

☑ Describes when and how training packet contents are used.

☑ Lists training equipment needed for the lesson.

☑ Provides transitions between different parts of the lesson.

☑ Lists likely answers that come up for questions posed in the lesson plan.

☑ Gives discussion-generating questions to be suggested to group as needed.
Dates to Post to Calendar

- When the training is due
- Set up meetings with SMEs and other advisors
- Schedule pilot
- When to post to Learning Center
- Schedule guest speakers
- Confirm guest speakers
- Print handout materials
- Make initial room arrangements
- Check room arrangements
- Order or reserve multi-media hardware
- Order materials and/or supplies
- Report to management on results

Materials and Rosters

- Handouts
- Sign in sheets / rosters
- Activities supplies
- Videos or DVDs
- Toys or activity sheets for kinesthetic learners
- Resources or reference materials
- Certificates
Writing Objectives

Template

<table>
<thead>
<tr>
<th>By the end of</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time frame</td>
</tr>
</tbody>
</table>

**will be able to**

<table>
<thead>
<tr>
<th>Action verb</th>
<th>Object of action</th>
</tr>
</thead>
</table>

**as evidenced by**

<table>
<thead>
<tr>
<th>Measurement (either quantitative or qualitative)</th>
</tr>
</thead>
</table>

Example: “By the end of this session, new trainers will be able to write a complete objective, using the template (as evidenced by a five-part written objective).”
Lesson Plan

<table>
<thead>
<tr>
<th>SUBJECT:</th>
<th>LESSON TITLE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>LENGTH OF CLASS:</td>
<td>PREPARED BY:</td>
</tr>
<tr>
<td></td>
<td>DATE:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LEARNER OBJECTIVES:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>LESSON REFERENCES:</th>
</tr>
</thead>
</table>

**INSTRUCTIONAL AIDS**

<table>
<thead>
<tr>
<th>Equipment:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplies:</td>
</tr>
<tr>
<td>Printed Material:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TYPE OF PRESENTATION:</th>
<th>SPACE REQUIRED:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SPECIAL CONSIDERATIONS:</th>
</tr>
</thead>
</table>
# DHS and OHA Training Course Evaluation

**COURSE TITLE:**

<table>
<thead>
<tr>
<th>Course number:</th>
<th>Location:</th>
<th>Date (mm/dd/yyyy):</th>
</tr>
</thead>
<tbody>
<tr>
<td>C01379</td>
<td>Yoncalla</td>
<td></td>
</tr>
</tbody>
</table>

**Instructor:**

Jennifer Webster

**Your name (optional):**


*Instructions: Please type or use blue or black ink.*

Thank you for taking the time to complete this evaluation. Your feedback is encouraged and appreciated. It will be used to make improvements to our courses.

**Rating scale:** 1 = Poor  3 = Average  5 = Excellent

<table>
<thead>
<tr>
<th>Rating – please fill in</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
</table>

1. How would you rate your knowledge of this subject prior to the training?  

2. How would you rate your knowledge of the subject after the training?  

3. How would you rate your skill (*ability to take action*) after this training?  

4. How would you rate the value of the information to your job?  

5. How would you rate the speaker’s knowledge and understanding of the topic?  

6. How well did this course meet the objectives?  

7. How would you rate the overall presentation?  

8. What is your level of interest and commitment to apply the information and tools from this course?  

9. What is your level of interest and commitment to learn more about this topic?  

10. Would you recommend this course to others?  

   □ Yes □ No

OVER
11. What are three things you learned that are important to you or your work?

12. What are the three skills and/or tools that you can apply now on the job?

13. What suggestions do you have to improve the content and/or process of this learning experience?

14. Do you have additional training needs in the topic area for this course?
Trainer Tools overview

This section gives you six tools trainers commonly use to focus learners so they work cooperatively to learn information or make decisions. These are learner-centered and follow the Adult Learning Principles described in this manual.

They will help you design, develop/present/implement and evaluate training that meets the DHS and OHA Training Standards.

The tools explain ways to structure learner time and participation. They are used to:

- Organize information/concepts (Mind Map);
- Build learner rapport (Icebreakers);
- Construct learner activities (Cooperative Learning, Jigsaw, Nominal Group Technique);
- Evaluate training experiences (Critical Incident Questionnaire).

All trainers should have these basic tools in their “tool kit” to help facilitate, manage the classroom, ask questions and give feedback. You can print them for easy reference when developing your lesson plans.

For your convenience, each tool tells you:

- What it is;
- Why you use it;
- What it does;
- How to do it.

Some pages also include tips, variations and references.

While you are planning and designing trainings, repeatedly ask yourself, “Which of these tools can I use for this part of the learning?”

Further explanations and background can be found on the Web by typing the tool name into your computer’s search engine (for example, enter “critical incident questionnaire + training”). If you search “training methods” or “activities/strategies for trainers,” you will find additional tools.

Another good source is the “Training Methods and Techniques” section of the “Train the Trainer” manual from Organization and Employee Development Services.

We hope you find these tools useful and engaging.
Mind Map

What is it?
A Mind Map is a way to display information using words, connecting lines, color, and — if desired — symbols and pictures. Much more flexible than traditional lists, a Mind Map takes advantage of the mind’s ability to generate random ideas and relate them to each other.

A typical map is multi-colored, laid out on one or more large sheets of paper with words and/or drawings connected in various ways.

Why use it?
It organizes random ideas for planning, brainstorming or instructing. It is easy to use individually or with a group. It gives trainers a way to have all learners participate simultaneously when they create a “group mind map.”

What does it do?
It focuses the learners’ attention and makes information easy to recall because it works more like a picture than a list.

It shows how items relate both to the main idea and to all other ideas.

How do I do it?
1. Use a flip chart size or larger paper and colored markers.

2. In the center, write a word or two or draw an image for the topic (for instance, write “Picnic” or “Retirement Party” or draw a picnic/party item).

3. Draw a border around the topic.

4. Draw curving lines that radiate from the border and title each one with a main theme (for instance, Food, Date, Location, Games, Cleanup).

5. Draw branching thinner lines from the main lines and title them with details (for instance, the types of food, the names of games and the plan for cleanup).

6. Color-code related ideas by coloring the branches or circling the resulting cluster of ideas. (See References on next page for examples on the Web.)

Tips
- Use single words or simple phrases.
- Print words clearly.
- Use symbols, images and/or pictures.
- Use shapes, circles and boundaries to relate information.
- Use arrows to show cause and effect.
- Be creative!

Variations
Use your computer search engine or the Web addresses below to see additional examples.

Mind Map example:
References

Buzan, Tom (creator of the Mind Map concept in the 1960s)
www.thinkbuzan.com/us

Ygnius (n.d.). Mind Tools: Essential skills for an excellent career
www.mindtools.com/pages/article/newISS_01.htm

On-line example of Mind Map
www.mindtools.com/media/Diagrams/mindmap.jpg
Icebreakers

What is it?
An Icebreaker is an activity used to introduce a group of individuals to one another or to a common goal, or to stimulate a group’s thinking.

- **Energizers and tension reducers** can help shift the disposition of a group.
- **Feedback and disclosure activities** can help form the basis for interaction by having learners share personal thoughts, feelings or perceptions.
- **Games and brainteasers** can help stimulate creative thinking or create opportunities to consider alternate perspectives.
- **Getting acquainted openers** can allow individuals to learn more about others in a non-threatening way.
- **Professional development topics** include activities based on questions or situations related to specific professional development themes such as leadership, teamwork or motivation.

Why use it?
Icebreakers allow learners to build comfort within a group by sharing a common structured experience designed to increase communication through disclosure and cooperation.

What does it do?

- It introduces learners to one another through names, professional roles and commonalities and can eliminate some barriers to communication.
- It can reduce anxiety or inhibitions and build camaraderie within a new or existing group.

How do I do it?

1. The types of materials needed depend on the activity.
2. Determine the purpose: For example, introducing a training goal or group members.
3. Consider the audience: What is its size? Is it established or new? Do members trust each other?
4. Select the activity: Think **relevance**. Can the activity cause barriers? Can everyone take part? Does it fit the purpose, the audience and personality styles?
5. Consider the context: Environment, available time, group culture and size.
6. Plan the steps to the activity including instructions, materials, timing, furniture and room needs.
7. Plan the transition from the activity into the class content.

Tips
If it is your first time with icebreakers, review the different types listed here and on the Web before you select one.

Remember your purpose and relevance, relevance, relevance.

Talk to others who use these techniques.
Variations

There are endless variations. Be creative!

Personality Report — Volunteers are asked to share some information about themselves.

Personality Clue — Volunteers are asked to share information they might not normally share, such as favorite memories, most embarrassing moments.

Attitude Report — Volunteers are asked to give their reactions to a particular question or topic.

Attitude Clue — Volunteers are given information and discuss what they think of it.

Individual Lead-in Questions — Lead-in questions identify individual learning needs and goals (for example, ask, “What are one or two burning questions you hope will be answered in this session?”).

Handful of Icebreakers — Pair up participants. Instruct them to choose one of the topics below and interview each other about it.

1. Three unusual things that have happened to them.
2. Their special talents and hobbies.
3. Their most important job responsibility.
4. The person they most admire.
5. A color and an animal that best describe who they are and how they feel.
6. How they would spend a million dollars.

References

Enter the term “icebreaker” into your search engine for a huge variety of possibilities.


Cooperative Learning

What is it?
Cooperative Learning is an instructional method where learners take active parts and responsibility for learning and teaching material. Trainers design activities so learners work together to ensure that each person learns to the acceptable level.

Why use it?
It can be used with any subject and without a special curriculum.

It generates simultaneous participation of all participants, and reduces the incidence of over-participation by only a few individuals.

Each learner interacts with the topic/material and builds understanding and recall. By bringing their own personalities and points of view to the work, cooperative learners bring relevance that trainers may not have been able to bring.

What does it do?
It encourages learners to actively seek information and helps groups identify areas for further study.

It honors adult learning principles, creativity and diversity of approaches.

How do I do it?
1. Supply paper, cards, flip charts and markers for recording and presenting.
2. Design meaningful activities that require each learner to actively participate toward the common goal.
3. Structure tasks through roles designed to fit the particular assignment. Have runners, checkers, recorders, reporters, timekeepers, illustrators, etc. Let learners self-select roles, but require full participation. Change roles frequently to give learners the opportunity to practice new roles.
4. Form groups of four to six learners depending on the assignment. This gives learners an opportunity to equally contribute. Give group assignments and time frames. Monitor groups while they work; give feedback and encouragement and keep time.
5. Give students specific tasks to finish within a predetermined time limit and give guidelines about working together, such as minimizing socializing, no “put downs” and equal contributions.
6. Permit learners to make decisions, add ideas and negotiate within the group. You may need to decide when and how much to intervene when a group is struggling. Ask questions that will help the group think through their difficulty or identify a new direction they can take.

Examples of activities:
The “Jigsaw” cooperative learning tool is described separately in this Trainer Tools section.

“Think-pair-share” promotes discussion and provides feedback. Here are the steps:
1. Give learners a topic and time to think about it (or use a pre-designed list and have pairs of learners cooperatively choose their topic from the list).
2. Have learners pair with another person.
3. Have learners take turns sharing their responses within a time frame. (You are the time keeper.)

4. Ask some of the pairs what they discovered.

“Three-step interview” promotes discussion and develops listening skills. The steps include:

1. Divide the class into groups of four to discuss a chosen topic.

2. Give learners a number from 1 to 4.

3. Use these three steps for the three-step interview:
   a. Learner 1 interviews Learner 2 while Learner 3 interviews Learner 4.
   b. Learner 2 interviews Learner 1 while Learner 4 interviews Learner 3.
   c. Learner 1 shares what he or she has learned from Learner 2 and so on until each learner has shared within the group.

4. You can further debrief groups by using “best idea only,” “stand up and share” or “team share.”

Tips
Clear instructions, goals and timelines for group activities are essential to successful cooperative learning. It is also important that each member has a specific function within the group.

Pay attention to the mix of group-member characteristics such of genders, ages and professional levels. If the mix doesn’t seem to work, consider forming groups differently for new activities. (Make this remix look fun and planned, not like a reaction to a problem.)

Be prepared to give balanced feedback. Some groups may outshine others, but downplay competition.

Variations
Search the Web for cooperative learning structures that fit or inform your training design.

Ask other training specialists for their favorite cooperative learning activities.

References:
Enter “Cooperative Learning” or “cooperative learning structures techniques” into your search engine for a huge variety of possibilities.

Jigsaw

What is it?
Jigsaw is a training structure for doing cooperative learning. Cooperative learning is the instructional use of small groups so that learners work together to maximize their own and each other’s learning.

Trainers assign topics to groups to read and study. After they learn their section of the material they teach it to one another, making sure everyone in their group succeeds in learning their entire piece well enough to present to the rest of the class. All of the groups’ pieces come together like a jigsaw to form the entire learning.

Why use it?
Adult learners prefer to engage with the training material rather than to be passively taught. Teaching others helps learners recall what they learned and builds bonds in the groups. Active learning is a strong preference for adult learners.

What does it do?
It shows learners whether everyone in the group learns the topic, so they can give/get further help until each person can succeed.

It minimizes over- or under-involvement of individual learners and reinforces learning through repeated interaction with the topic.

How do I do it?
1. Choose learning material that can be broken into chunks or segments. A segment can be as short as one sentence or as long as several pages.
2. You count the number of learning segments and the number of participants. Equally distribute the different segments to the subgroups. For instance, with 12 learners, divide learning materials into three segments. Form three groups of four people and assign each group either segment 1, 2 or 3. Ask groups to read, discuss and learn their assigned segment. Supply multi-point handouts, index cards, whiteboard or flip charts — or even access to Power Point to assist with learning and teaching the segments.
3. After the study period, you form cooperative learning subgroups by having each quartet member count off 1, 2, 3 and 4. Then form cooperative learning trios of participants with the same number: one person who has studied segment 1, one who has studied segment 2, and one who has studied segment 3.
4. Each member then teaches his/her segment to the other trio members.
5. Reconvene the full group for review and to answer remaining questions. This ensures accurate understanding of each piece of the puzzle.

Tips
If the material is lengthy, have participants read the assignments before they come to the training session. (Materials can be emailed or put into a Learning Center Team Room by phoning 503-947-5457 for assistance.)

Variations
To build a visual of the total lesson, you can make actual puzzle pieces to represent the topics. (Enlarge computer graphics or use pictures from magazines.) Glue these to foam core board or
poster board. Draw enough shapes on the back of the puzzle to have one piece for each group. Cut them apart. Give each group their piece when making assignments. At the end, you have each group put its piece into the puzzle located where all can see the completed picture.

References


Nominal Group Technique

What is it?
Nominal Group Technique (NGT) is a way to structure group brainstorming so every learner is included, and it may be used with ranking/voting to produce a set of prioritized solutions, issues or recommendations.

Why use it?
It allows every learner’s views to be considered, so it prevents domination by any individual and it encourages more participation from passive group members.

Nominal Group Technique (NGT) has a low preparation time, a low administration time and — when used with voting — a moderate analysis time.

What does it do?
NGT gets students immediately engaged in the learning process.

NGT gives a snapshot assessment of collective learner knowledge, attitudes and experiences about a topic.

How do I do it?
1. The core of the technique is the use of anonymous cards. These can be sticky notes, 3 x 5 index cards, small pieces of paper, or whatever is convenient. Use flip charts and markers to capture group ideas for discussion.
2. Give an open-ended question or statement of focus and set a time limit (for example, “Let’s take about three minutes to think of ways we could improve cultural competency.”)
3. Have each learner silently write possible ideas one at a time on single sticky notes or other material you chose.
4. Collect and randomly redistribute these ideas to make them anonymous.
5. Have learners read answers round-robin fashion. Write them on a flip chart or whiteboard and cluster similar thoughts. No criticism is allowed, but clarification in response to questions is encouraged.
6. Discuss the solutions.

Tips
Before you begin the exercise, state NGT’s purpose, which is to gather and organize input from everyone. Explain how the answers will be used. This will give meaning to what you are asking the learners to do.

Remind learners to write legibly and to put only one idea on each note or card.

Look for ways to use NGT. It is probably not used as often as it can be.

Variations
NGT evaluation by vote:

Use the same materials as above, but add colored dots or markers.

1. Divide learners into groups, preferably seated around a table.
2. Have learners silently write their cards; collect them into the center of the table and have a volunteer read them one at a
time while a recorder clusters them onto a flip chart. (No criticism is allowed, but clarification in response to questions is encouraged).

3. Have each learner evaluate the ideas and individually vote for the best ones (e.g., five points for the best, four points for the next best, etc.). [Have them mark the items with colored dots (for instance, red for five, green for four, etc.) This makes tabulation faster than writing actual numbers. Use sticky dots or markers.

4. Groups count their votes and tabulate. They produce a report showing the ideas that received the most points.

5. Allow time for groups to briefly present their results.

References

www.icbl.hw.ac.uk/ltdi/cookbook/nominal_group_technique/

www.joe.org/joe/1984march/iw2.html

http://tep.uoregon.edu/services/newsletter/year95-96/issue30/nominal.html
Critical Incident Questionnaire

What is it?
The Critical Incident Questionnaire (CIQ) is a short activity completed at the end of a training session. The CIQ is primarily a formative assessment. You can also use it at the end of the entire training as a summative evaluation tool. (Type either “summative assessment” or “formative assessment” into your search engine for full descriptions.)

Why use it?
It allows learners to become more aware of their learning process when asked to think about class incidents that were significant to them.

Learners’ feedback can confirm or refute trainer assumptions about learners’ thoughts or opinions; this can guide professional development or adjustments to teaching strategies.

What does it do?
The CIQ asks learners to reflect on several specific reactions and learning experiences. The answers can help trainers become more aware of their intentional and unintentional impact on learners.

How do I do it?
(The questionnaire takes between five and 10 minutes per class.)

1. At the first class, tell learners you will use the CIQs and explain why. Describe how it will help you offer a better course and how you have used it to learners’ benefit in other trainings.

2. Near the end of class, give each learner two copies of the questionnaire (some trainers do this at the beginning of class).

3. Learners return one copy as they leave for the day and keep one copy.

4. Read and review all the questionnaires. (Time depends on the number of learners; for classes of 25–35, plan approximately 30 minutes for this step.)
   a. Look for themes and trends in the responses.
   b. Look for problem areas and comments about confusion.
   c. Highlight strong or “hot” comments.
   d. Create a summary in the form of notes or handouts to share at the next class time. Quote comments anonymously where needed.
   e. Reflect on the responses; consider what you learned, what you might change and how to present your summary.

5. Start the next class by debriefing on the themes surfaced by the CIQ.
   ▪ Highlight areas where the comments changed your plans, strategies, topics, etc.
   ▪ Clarify points that were confusing to learners.
   ▪ Report on constructive feedback about yourself. (Remember to take feedback seriously, but not personally.)
   ▪ Share your thoughts about the feedback. Acknowledge diverging opinions and, if you disagree, give more information about your position. However, do not sacrifice your non-negotiable expectations of the training or the class. If there were contentious issues, discuss them.
Tips
Use a CIQ in situations outside the classroom such as in workplace conflict resolution, in social and personal situations and with work teams.

Consider completing a questionnaire from your perspective to share during your debrief.

Variations
Use a CIQ as a summative assessment by having learners complete the form at the end of their training curriculum. The report can be shared electronically if desired.

References


Critical Incident Questionnaire

Please take about five minutes to respond to the questions below; you may use the back if you need more space. Don’t put your name on the form — your responses are anonymous. If nothing comes to mind for a question, you may leave the space blank. Responses will be shared anonymously with the class. Thank you for taking the time to do this. What you write will help make the training more responsive to your concerns.

At what moment in the training did you feel most engaged with what was happening?

At what moment in the training were you most distanced from what was happening?

What action that anyone (trainer or participant) took in the training did you find most affirming or helpful?

What action that anyone took in the training did you find most puzzling or confusing?

What about the training surprised you the most? (This could be about your own reactions to what went on, something that someone did or anything else that occurred.)