U.S. Department of Justice
National Institute of Corrections

ITIP Toolkit

A Guide for Working with Curriculum Developers

NIC
National Institute of Corrections

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March 2011

NIC Accession Number 024773

Acknowledgments

The idea for the Training Coordinator's Tool Kit began with Division Chief Chris Innes and Dee Halley, of the NIC Research and Information Services Division, as they worked to find a way to determine if training developed and offered by NIC was learner-centered, training that guided the learners to use the skills taught to improve the way they performed their job. The primary audience for the Tool Kit was to be training coordinators responsible for ensuring that all lesson plans followed the ITIP (Instructional Theory Into Practice) format.

The project goal was to develop a user-friendly tool kit that would be:

- Grounded in research
- Follow and promote use of the principles of the ADDIE model and ITIP
- Provide a mechanism for the user to work with curriculum designers to set expectations, then to review, evaluate and give feedback on the curriculum as it is being developed

During the development of the ITIP Tool Kit the following CPS staff served as DACUM panelists to help us clarify their needs in working with curriculum developers and as a pilot group to review the tool kit and give us feedback: Robbye Braxton-Mintz, Leslie LeMaster, Steve Swisher, Bernie Iszler, Cathy Banks, Lori Eville, Maureen Buell, Michael Jackson, Patricia Taylor and Rob Jeffreys.

Additional input and guidance was provided by members of the NIC Training Directors Network and trainers from around the country who enhance NIC's ability to deliver training nationwide through the Regional Training Network.

It is our hope that through the contributions of those dedicated to training excellence the Training Coordinator's Tool Kit can serve as a valuable resource to training directors and coordinators in prison, jail, community corrections, and juvenile justice systems and agencies throughout the country to enhance organizational and professional performance.

Betty Gurnell and Renee Bergeron
Tool Kit Project Team
December 2010

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Purpose:

Tool Kit and Components

The Tool Kit can help you:

- create a curriculum development project plan including realistic timeline
- find the best consultant/consultant team for the project
- write an RFP
- select a Curriculum Design Team
- clarify expectations
- analyze deliverables and give feedback
- select a training team
- answer questions posed by consultants
- ensure that a quality ITIP curriculum is produced
- evaluate a project
- keep a project on track
- provide tools for project consultants

Frequently Asked Questions (FAQs)

Responses are provided, along with links to additional information, for the most asked questions related to both the ADDIE model of Instructional System Design and the components of the ITIP process.

ADDIE model of Instructional Systems Design

This systems approach to curriculum design and development ensures that learning programs and the required support materials are continually developed in an effective and efficient manner.

ITIP – Instructional Theory Into Practice

The ITIP model is used to design training curriculum that actively engages learners, increases the likelihood that the objectives of the lesson plan are met and guides the learners to use the knowledge and perform the skills as taught when they are back on the job.

TOOLS

Tool 1 – Adult Learning Key Points

By reviewing the key points you can determine whether curriculum is adult/learner-centered, plan feedback for developers and orient the curriculum design team.

Tool 2 – Sample Agenda for Initial Design Team Meeting

This tool can help you plan the first design team meeting.

Tool 3 – Analyzing Needs – Checklist

The checklist can guide you to clarify expectations with the requestor, focus your project and ensure that training meets organizational needs.

Tool 4 – Guide for Giving Feedback on Curriculum

Use this tool in conjunction with Tool 8 – Feedback Worksheet – to plan feedback for the design team or curriculum developer.

Tool 5 – Curriculum Review Checklists

This is a two-part tool that can be used for any training modality. Use Checklist I to review the overall curriculum. Use Checklist II to review individual lesson plans. Together these checklists can help you clarify expectations and prepare feedback for the developer. You can also give the tool to the developer to use as a guide during the development process and as a means of formative self-evaluation.

Tool 6 – Forming a Curriculum Design Team

This tool can guide you in selecting the most effective members of the curriculum design team and clarify roles of all team members.

Tool 7 – Designing an Evaluation Plan

This tool, based on KirkPatrick's model of a four-level evaluation process, will help you in the design phase of ADDIE to develop an evaluation plan that will give you the information needed to write the final evaluation report.

Tool 8 – Feedback Worksheet

Use this tool as a worksheet in conjunction with Tool 5 – Guide for Giving Feedback on Curriculum.

Tool 9 – Formative and Summative Evaluation

This tool clarifies the difference between formative and summative evaluation.

Tool 10 – Selecting Consulting Team

This tool will help you in the selection of your curriculum development consulting team: determine critical tasks, clarify consultant skills needed, and plan questions to ask potential consultants.

Tool 11 – Interviewing Consultants: Questions and Tips

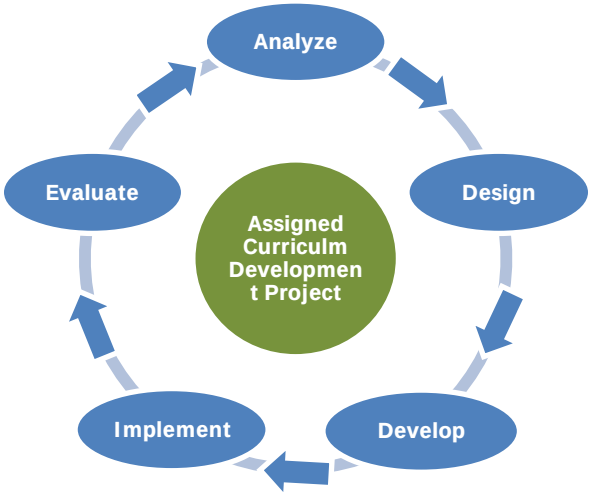
Use this tool to develop questions that will help you select the best candidate for the project.

Tool 12 – Needs Assessment Planning Guide

Use this tool to work with a client (the requestor) to clarify the project purpose and focus.

Tool 13 – Evaluating Use of Instructional Strategies

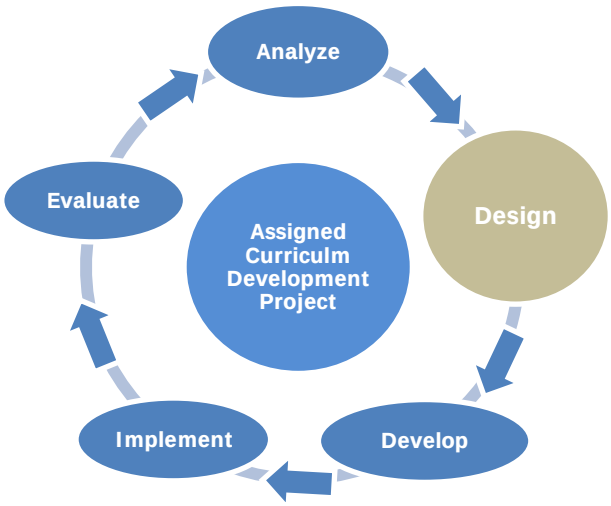
Use this tool to evaluate and give feedback to the consultants on their use of strategies. You can also give the tool to the developer to use as a guide during the development process and as a means of formative self-evaluation.



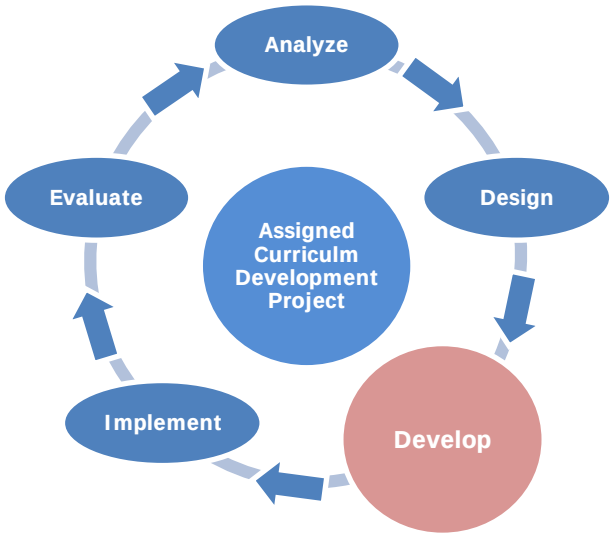
ADDIE – Cycle Overview
***Why** is this process important?*
Using the ADDIE Instructional System Design will help you complete the most successful curriculum design projects in an organized, efficient and effective manner. http://www.grayharriman.com/ADDIE.htm
***What** are the essential activities?*
• Analyze • Design • Develop • Implement • Evaluate
***How** is it done?*
It is a cyclical 5-phase model; activities may overlap from one phase to another. http://www.instructionaldesign.org/models/addie.html
What if? **FAQs –Cycle Overview**
• What if I am assigned the project after analysis has been completed? • What if I am asked to update an existing curriculum rather than create something new?

Analyze – *The study we do in order to figure out what to do.* - Allison Rossett & Kendra Sheldon (2001)
***Why** is this phase important?*
• Analyzes the gap between current performance and desired performance Tool 3 – Analyzing Needs: Checklist • Identifies what will be resolved as a result of the training • Identifies the target audience • Explores options for Curriculum Design Team members Tool 6 – Forming a Curriculum Design Team
***What** are the essential activities?*
• Review existing resources/materials • Conduct Needs Assessment, if applicable Tool 11 – Interviewing Consultants • Develop budget - http://www.nwlink.com/~donclark/hrd/costs.html • Clarify project roles and responsibilities Tool 6 – Forming a Curriculum Design Team • Develop timeline http://www.netmba.com/operations/project/gantt/
***How** is it done?*
• DACUM - Developing a Curriculum, a task analysis process http://www.dacumohiostate.com/process.htm • Surveys • Interviews • Gap Analysis http://alumnus.caltech.edu/~rouda/T2_NA.html • Focus groups • Review of existing resources
***What if?* FAQs – Analyze**
• What if there isn't time to formally assess training needs? • How do you know if training is the solution to the issue?

- What if the data gathered when assessing training needs indicates that training won't fill this gap – what are my options?
- How do you determine how long training should be (# of hours)?



Design – *Good design solves problems in a memorable way.*
***Why** is this phase important?*
• Provides a blueprint for developing, implementing and evaluating the training • Determines parameters for content • Sets expectations and uses formative evaluation to give feedback to design team
***What** are the essential activities?*
• Write preliminary curriculum outline • Host a meeting with design team • Write learning outcomes http://www.nwlink.com/~donclark/hrd/templates/objectivetool.html • Select delivery mode (the mode in which the training is presented. Common modes include face-to-face training, distance learning, self-paced or a blend of these modes). • Draft instructional strategies that will be used (to ensure learners meet the objectives most effectively http://olc.spsd.sk.ca/DE/PD/instr/categ.html • Write evaluation plan (methodology, data collection methods, timing and reporting formats) Tool 7 – Designing an Evaluation Plan
***How** is it done?*
Using the **ITIP** model
***What if*? FAQs – Design**
• What if you are updating an existing curriculum? • What if this phase is skipped and you proceed directly to curriculum development? • What if you need to give your Design Team some suggestions about instructional strategies?



Develop

Why is this phase important?

- Developing a complete curriculum package ensures that trainers and learners will have resources
- Trainers are able to deliver content that is consistent for each session
- Pilot testing provides the essential opportunity to refine the training program to better meet the goals and learner objectives

What are the essential activities?

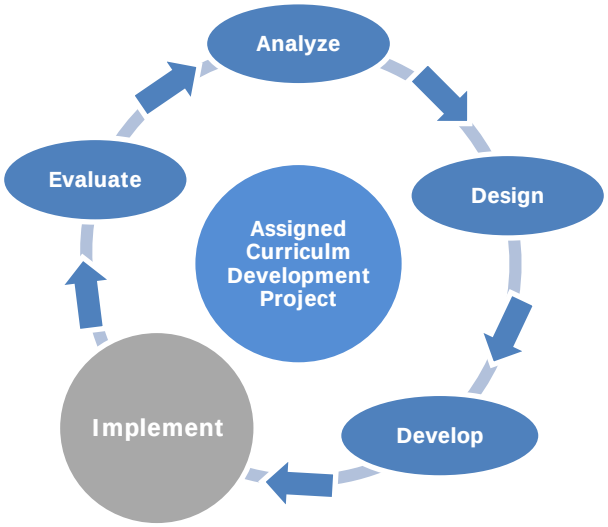
- Develop learner centered curriculum package **ITIP**
- Develop technology infrastructure and software
- Develop success measures
- Develop evaluation instruments
- Validate training - Pilot test the training program
- Compile feedback to include with other formative evaluation data
- Complete preliminary revisions

How is it done?

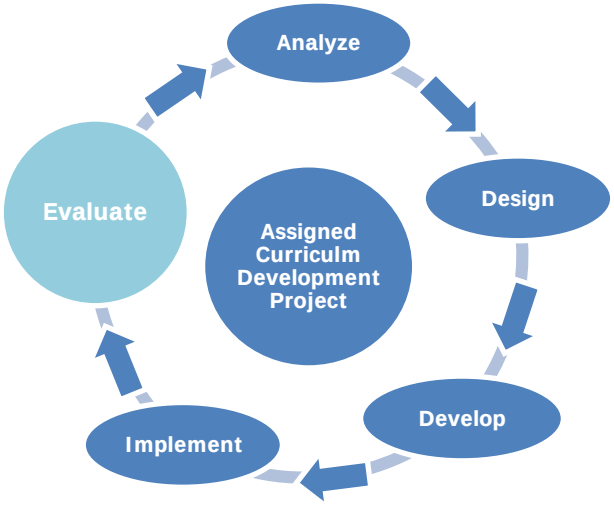
- Provide clear expectations Tool 8 – Feedback Worksheet
- Communicate regularly with design team members Tool 4 – Guide for Giving Feedback
- Monitor time line and keep process on track using Gantt charts http://www.netmba.com/operations/project/gantt/ or flow charts http://www.asq.org/learn-about-quality/process-analysis-tools/overview/flowchart.html

What if? **FAQs – Develop**

- How do you know when you have a completed curriculum package?
- What if the consultants are not delivering the product as expected?

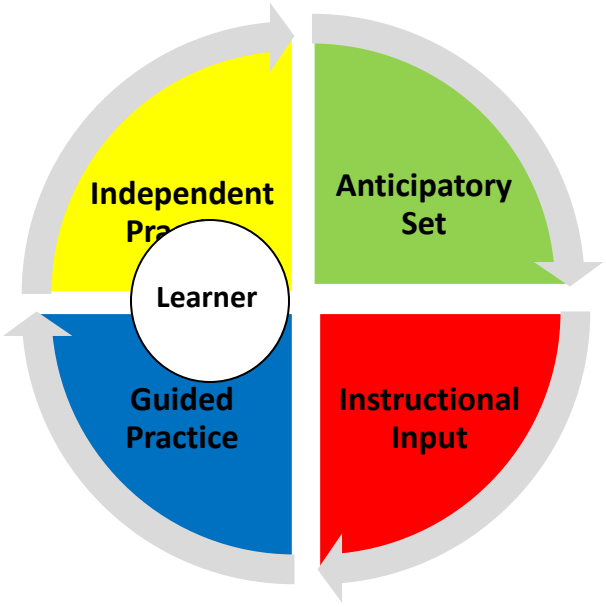


Implement
***Why** is this phase important?*
Target audience successfully completes the training program thereby addressing the gap identified in the analysis phase.
***What** are the essential activities?*
• Conduct training • Compile feedback from participants and training team • Compile level 1 and 2 evaluation measure http://www.businessballs.com/kirkpatricklearningevaluationmodel.htm • Document attendance • Compile and complete curriculum refinements
***How** is it done?*
• Market to target audience • Prepare trainers and other on site team members (pre-training meetings, Training for Trainers) • Manage logistics (registration, location) • Prepare learners (notification letters, independent work assignments) • Prepare materials and equipment • Observe pilot and document feedback to include in evaluation process • Conduct daily and end of training feedback sessions with the participating training and design team
***What if?* FAQs – Implement**
• What if a trainer has to cancel? • What if a trainer is not prepared? • How (and when) do you give feedback to the participating Design and Training team?



Evaluate *A clever arrangement of bad eggs will never make a good omelet. (* C S Lewis) Evaluate curriculum to make sure the desired outcomes have been reached.
***Why** is this phase important?*
• Determines degree to which the project accomplished the intended goal • Targets revisions needed for future deliveries
***What** are the essential activities?*
• Conduct program evaluation • Make needed revisions and program adjustments • Write evaluation report
***How** is it done?*
• Through formative and summative evaluation Tool 9 – Formative and Summative Evaluation • Measures occur at different levels, the most common model uses Kirkpatrick's 4 levels of evaluation http://www.businessballs.com/kirkpatricklearningevaluationmodel.htm
What if? **FAQs – Evaluate**
• What if the project did not address the gap?

ITIP: A Learner-Centered model for effective training.



Overview

Why is ITIP important? *Feeding students endless content to remember (that is, declarative sentences to remember) is akin to repeatedly stepping on the brakes in a vehicle that is, unfortunately, already at rest.* (The Critical Thinking Community. http://www.criticalthinking.org/page.cfm?PageID=524&CategoryID=68

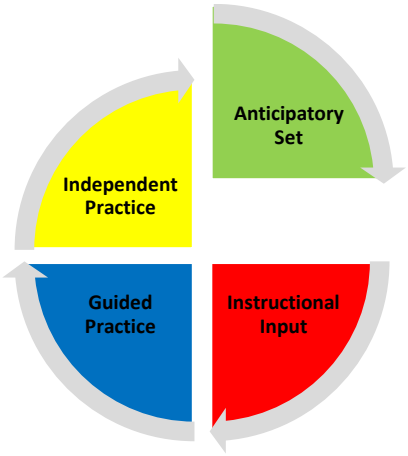
Retrieved March 17, 2010)

- Research-based
- Focused on adult learning characteristics **Tool 1 - Adult Learning Key Points**
- Learner-centered
- NIC adopted http://nicic.gov/Library/018534

What are the essential components of ITIP?

- Anticipatory Set
- Instructional Input
- Guided Practice
- Independent Practice

Anticipatory Set



Why is this important?

- Creates an active and trusting learning community **Tool 1 - Adult Learning: Key Points**
- Assesses and honors learners' topic-related experience and knowledge
- Motivates the learners
- http://nicic.gov/Library/018534

What are the essential components?

- Learners actively engage with each other
- The activity makes connections with the learning objectives
- Expectations of learners AND trainer are clarified

How is it done?

- Using instructional strategies designed to connect learners with each other AND with what they are about to learn **Tool 13 – Evaluating Use of Instructional Strategies**
- Using active learning to respond to learner question "Why do I need to learn this?"

What if? FAQs – Anticipatory Set

- There is not enough time?
- Learners already know each other?
- The skills are new – no one has previous learning or experience on this topic?
- The lesson plan is written by and for a subject matter expert? Does it still need to be in ITIP format?

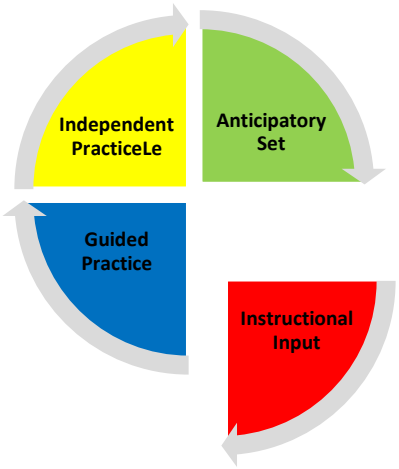
How is it done?

- ADDIE process
- Focus on the learner **Tool 1 - Adult Learning: Key Points**
- Curriculum Design Team **Tool 6 – Forming a Curriculum Design Team**

What if? FAQs – ITIP Overview

- There isn't time?
- It's a one-time presentation?
- You are not sure how to analyze and evaluate a lesson plan for ITIP components?
- SME isn't skilled in developing training using the components of ITIP?
- Training is in e-learning format?

Instructional Input

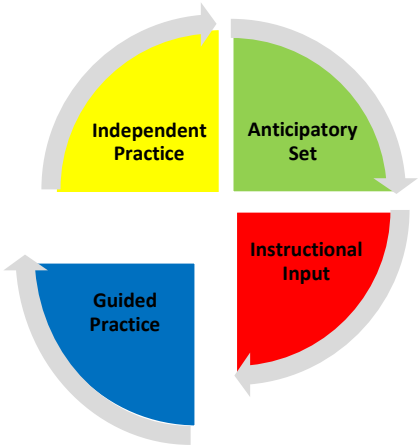


Why is this important?
• Provides the learning (knowledge/skills) needed to address the performance gap
What are the essential components?
• Connection with learning objectives • Information "chunked" into manageable bits • Logical flow • Participant engagement **Tool 1 - Adult Learning: Key Points** • Checks for understanding **Tool 13 – Evaluating Use of Instructional Strategies**
How is it done?
• Lecture • Demonstration that models skill exactly as it is to be done • Reading assignment • Projects – group or individual • Visuals • Experiential or discovery activities • http://nicic.gov/Library/018534

What if? FAQs – Instructional Input

- There is a lot of new information and not much time?
- The target audience is so large that it necessitates large classes?
- The trainers are comfortable and experienced with lecture and PowerPoint but not with learner-centered strategies?

Guided Practice



Why is this important?

- Enhances memory and instills confidence
- Practice with coaching and feedback ensures accuracy and effectiveness
- Moves learner from knowing information and skills to using information and skills
- http://nicic.gov/Library/018534

What are the essential components?

- Every learner has opportunity to practice
- Practice includes trainer observation, feedback and coaching
- Practice is directly connected to the learning objectives

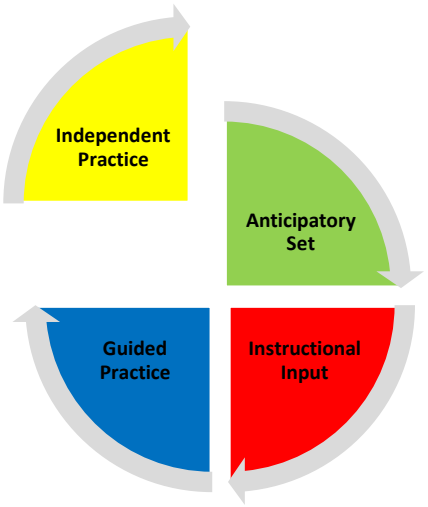
How is it done?

- Multiple trainers can serve as coaches and models
- Learners can be guided to observe and give feedback to each other
- Role plays, case studies and simulations can be used
- **Tool 13 – Evaluating Use of Instructional Strategies**

What if? FAQs – Guided Practice

- There's not enough time?
- The learning objectives are at the knowledge and comprehension level? Is practice still necessary?
- There are too many learners for the trainer to observe and coach each one?
- Is Guided Practice necessary for every section of Instructional Input?
- There is too much Guided Practice?
- How can you tell if an activity is Guided Practice?

Independent Practice



Why is this important?

- Expands learner perception of how to apply new information and skills in different settings
- Essential for transfer of learning from the training environment to the work setting
- Learners consider options and real-world constraints or challenges
- http://nicic.gov/Library/018534

What are the essential components?

- Practice without direct supervision and assistance
- Periodic observation with coaching and feedback on the job (supervisor)

How is it done?

- Simulations, case studies and role plays that present real-world work situations
- Written action plans to guide learners in integrating new knowledge and skills into existing expertise.
- Critical application questions throughout the training
- Individual assignments or projects with review and feedback
- **Tool 13 – Evaluating Use of Instructional Strategies**

What if? FAQs – Independent Practice

- There's neither time nor resources needed to conduct an Independent Practice in the learning setting?
- Supervisors are not trained to observe and coach in the new skills?

Tool 1 - Adult Learning: Key Points

Use this tool to ensure that curriculum is adult/learner-centered, plan feedback for developers, to orient curriculum design team.

Adult learners are …	So training needs to ….
• **Busy**	• Address learners' need to know • Make good use of time • Be immediately applicable • Relate directly to their work setting
• **Experienced**	• Recognize and honor their experience • Connect the new learning with what is familiar • Engage learners as partners in the learning • Provide opportunities for them to contribute to the learning
• **Resistant to change**	• Occur in a safe and trusting environment • Provide practice with feedback to build confidence • Encourage risk-taking and learning from mistakes • Break the learning down into manageable steps
• **Comfortable with preferred learning style**	• Employ a variety of learning strategies • Engage learners actively

Tool 2 – Sample Agenda for Initial Design Team Meeting

Use this tool to help you plan the first design team meeting.

Suggested Time Frame (minutes)	Suggested Topics
15	Review project purpose
10	Review housekeeping and logistics relating to the process of the meeting
30	Conduct an icebreaker that will introduce team members
15	Review timeline and milestones
15	Review expectations for deliverables
15	Discuss logistics for working as a team
15	Question and answers

Tool 3 – Analyzing Needs: Checklist

Use this tool to help clarify expectations, focus your project and ensure that training meets organizational needs.

Type of information	What do you know?	What do you need to find out ?	How will you find out?
Project context • Who made the request? • What are the goals? • Why this project? Why now? • Is the project based on the results of an assessment? If so, where is the information? • If not, what is driving the project?			
Target audience • Who needs to be trained? • What characteristics of the target audience need to be considered? (Program entry requirements, special needs, current skill level.)			
Desired Performance • What do you want participants to do differently as a result			

of the training? • What is the current level of performance versus desired level of performance?			
Content expertise Who are the subject matter experts?			
Development Expertise Who has the knowledge, experience, skill to develop curriculum for this program?			

Training Expertise Who has the knowledge, experience, skill to train in this area or on this topic?			
Logistics • What are the financial parameters? • When does it need to be done? • What is the budget? • Is a training platform specified? (i.e. face-to-face, blended, e-learning) • What other expectations need to be considered? (Technologies, timing, duration)			

Tool 4 – Guide for Giving Feedback on Curriculum

Use this tool in conjunction with **Tool 8 – Feedback Worksheet** *– to plan feedback for the design team or curriculum developer.*

BENEFIT	How?	Example of Feedback Statement
Behavioral focus	Base feedback on behavior, not personality.	**Try** - *This piece didn't seem to engage the learner. Let's try using a demonstration instead of a lecture.* **Rather than -** *You're really stuck on using lecture here.*
Even	Keep feedback even and balanced. Comment on strengths, not only on what is missing or needs changing.	**Try -** *The learning objectives are clear, measurable and at the application level or above. The lecture scripts are organized and clear, but in this section there's no learner engagement. What if you try writing some thought-provoking questions? You would also need to add suggested responses for each question to aid the trainer.* **Rather than** - *You need to provide more learner engagement, and you need to add suggested responses for the questions.*
Non-judgmental	Feedback is two-way communication. Keep an open mind.	**Try** - *I'm not clear about how this activity gets them to practice the new skill. Help me understand. How will what they do in the activity relate to the action specified in the objective?* **Rather than** - *This activity doesn't make any sense to me.*
Examples	Give examples of strengths and areas for improvement.	**Try -** *The input and guided practice will clearly guide the learners to reach the objective. For this set of questions you need to add suggested responses. For example ……. "* **Rather than -** *This is really good and I can tell you've worked hard, but you need to add more instructions for the trainer.*
Facts	Focus on facts.	**Try -** *In this section there are three 30-minute lectures with no learner engagement. What are some of your ideas about how you could better engage the learners?*

		Rather than - *There's just too much lecture all the way through and you don't engage learners enough.*
"I"	Own what you say by using "I" statements.	**Try** - *Let's look at these instructions. If I were the trainer I don't think I would know exactly what to do. Let's talk through it ……* **Rather than** - *These instructions are not clear.*
Tune-in	Listen to and "hear" the other person's ideas, questions and concerns.	**Try** - *What are some ideas you have for making this input section more learner-centered?* **Rather than -** *I want you to shorten this lecture.*

Tool 5 - Curriculum Review Checklists

This is a two-part tool that can be used for any training modality. Use Checklist I to review the overall curriculum. Use Checklist II to review the individual lesson plans. Together these checklists can help you clarify expectations and prepare feedback for developer. You can also give the tool to the developer to use as a guide during the development process and as a means of formative self-evaluation.

I. Curriculum Package http://nicic.gov/Library/018534

✔	What to look for	Strengths	Suggestions/concerns
	Clearly stated outcome		
	Summary of learning objectives: measurable; at least one in each module at the application level or above; collectively lead to outcome		
	Scripted lesson plan with enough detail to enable experienced trainers to conduct the training.		
	Consistency in format and language from one module to another and between lesson plans, visuals and learner materials		
	Timing: realistic and clearly indicated for all presentations and activities		
	Sample agenda		
	Up-to-date resource list		
	Easy to read/follow format		
	A plan for both formative and summative evaluation		
	Clear connection between modules		
	Logical sequencing of topics		
	Date of development/review/revision		
	List of materials, equipment, resources needed for delivery		
	Attributions or copyright permissions provided		

II. Individual Modules

✔	What to look for	Strengths	Suggestions/concerns
	Learning objectives for each skill or competency • Clearly stated • Measurable • At least one at the application level or above • Support overall outcome		
	Anticipatory Set • Actively engages all learners • Connects new learning with what is familiar • Engages learners as partners in the learning • Creates safe and trusting learning environment • Connects learners with topic		
	Instructional Input • Presents up-to-date skills, information, models, techniques • Actively engages all learners • Includes information and skills necessary for mastery of learning objectives • Uses thought-provoking questions that invite discussion • Includes frequent checks for understanding with questions and activities • Provides suggested responses for all questions		

	Guided Practice • Provides opportunity for each learner to practice using new information and skills with coaching and feedback • Includes practice activities that are directly linked to learning objectives • Promotes transfer of learning from the learning environment to the workplace by using realistic activities, examples and problems • Provides clear trainer instructions for activity set up and debriefing, including questions with suggested responses		
	Independent Practice • Includes work-related practice activities • Provides action planning or independent work assignments that help learners prepare for continued skill practice on the job		
	Evaluation and Closure • Summarizes key points • Provide opportunity for trainers and learners to measure the extent to which learning objectives have been met		
	Adult Learning Principles • Provides reinforcement and review of learning objectives, goals and outcome through checks for understanding and opportunities for questions and clarification		

	• Actively engages all learners • Includes variety of instructional strategies throughout		
	Visuals • Support the learning • Are consistent with information presented in the lesson plan and participant materials • Use limited text in visual presentations		
	Learner materials • Support the learning • Are consistent with lesson plan		

Tool 6 – Forming a Curriculum Design Team

Use this tool to form a team comprised of the roles defined below.

Curriculum Design Team Roles

As a team, members will use their diversity and creativity to collaboratively develop and deliver a quality product that meets the needs of the target population. The size of the team will vary depending on the scope of the project but 5 – 7 members is optimal.

Team Leader (CPS)	Curriculum Design Specialist	Subject Matter Expert	Trainers/Training Teams (2 – 3 trainers per team).
	Experienced in designing learner-centered, ITIP'd curriculum	Practitioner knowledgeable and experienced in the topic area.	Experienced in developing as well as facilitating learner-centered lesson plans. At least one training team member should have some experience and expertise in the topic area.
Select and invite Design Team.	Assist in design and development of the project.	Provide content information and other resources. (Examples - case study content or role play dialogue.)	Review design and give feedback on clarity of instructions for trainers.
Facilitate project process by conducting meetings, coordinating communication, giving feedback.	Use ITIP format (includes development of the learning objectives, instructional strategies, design flow, visuals and learner materials needed for the specific topic).	** Give feedback and guidance on accuracy and relevance of the information as it is incorporated into the curriculum.*	**Special Considerations –** During the pilot testing, observe participants for possible trainer candidates. It is helpful to include some trainers that have been involved in the pilot.
** Review all drafts to ensure that they meet the intended goal of the program.*	Ensure that content corresponds with the information provided by subject matter expert(s).	**Special Consideration –** At least one SME should be a member of the target population to provide formative evaluation data.	**Refer to Tool 11 – Interviewing Consultants**
Monitor project schedule.	Be on site for the pilot of the training program to observe and to give and receive the feedback needed to revise the design.		

*Best Practices in Staff Development and Training - *Juvenile Justice Trainers Association, 2000*

Tool 7 – Designing an Evaluation Plan

Use this tool in the design phase of ADDIE to develop an evaluation plan that will give you the information needed to write the final evaluation report. (Based on KirkPatricks four levels of evaluation model).

Questions to Ask	What do you know?	What do you need to find out?	How will you find out?
Does the lesson plan include tools to measure the learners' reaction to the training?			
Are there strategies within the lesson plan to evaluate the learners' progress in reaching the learning objectives?			
Are there measures to evaluate the extent to which the learner has used the desired performance change once he/she has returned to his/her work place?			
Are there measures to determine the extent to which the change in job performance has impacted the overall goal/purpose of the training as linked to the organization/criminal justice field?			
Do the proposed measures provide enough information to write the summative evaluation report?			

Tool 8 – Feedback Worksheet

Use this tool as a worksheet in conjunction with Tool 5 – Curriculum Review Checklists.

Questions	Responses
Why do you want to give feedback – what is your goal?	
What do you need to do to prepare?	
What questions will you ask?	
What are some steps you want the receiver to take as a result of your feedback?	
How and when are you going to give the feedback?	
Once you give the feedback, how will you follow up with the receiver?	
How will you determine if the feedback was effective?	

Tool 9 – Formative and Summative Evaluation

Use this tool to clarify the difference between formative and summative evaluation.

Is it soup yet? Using formative and summative evaluation is like making soup. The difference is that *when the cook tastes the soup, that's formative; when the guests taste the soup, that's summative.* - **Robert Stakes**

Formative Evaluation … provides information to refine and improve a training program as it is being developed and piloted.	**Summative Evaluation …is done at the end of a training program to answer the question***: Did the program produce the intended results?*
Analyze – Will these learning outcomes address the identified performance gap? (Why do you want to make soup? What kind of soup will you make? How many people do you plan to feed? Does this soup recipe address special requests – low fat, high protein, vegetarian?) **Design** – Will this timeline enable you to reach the stated target date? Do you need additional skills on your development team? Are the learning objectives measurable and at a high enough level to affect job performance? (Are the ingredients available to make the recipe selected? Does this chef have the skills needed to make this soup? Will this recipe enable you to make it in the time available? What are the ingredients you will need? Are they available?)	**Evaluate** – Did the training reach the intended target population; help all the learners reach the objectives; reach the stated outcome? Did you get where you wanted to go and accomplish what you intended? Can they perform the skills on the job? (Did the soup turn out as you had planned -for example healthy and tasty? Did the guests like it enough to request it again? Or to get the recipe and start making it for themselves?)

Develop – Are deadlines being met according to the timeline? What adjustments need to be or can be made? Will the instructional strategies help learners reach the stated learning objectives? Do the lesson plans and support materials align with the objectives and strategies planned during the design phase? (Did you assemble ingredients and prepare the soup according to the recipe?) **Implement** – What is the feedback from learners and trainers after the pilot? What revisions are suggested? Were the learning objectives met? Did the learners have adequate resources? Were the time estimates realistic? Were the trainer instructions clear? (Did you adjust the soup seasonings after tasting it? Is it better?)	http://www.nwlink.com/~Donclark/hrd/isd/types_of_evaluations.html

Tool 10 – Selecting Consulting Team

Use this tool to select a consulting team for the curriculum development. It will help you determine critical tasks, clarify consultant skills needed and plan questions to ask.

Tasks	Questions
Define what you want the consultant to do. **Develop timeline with milestone dates and responsibilities for the design team**	**Questions to Ask Yourself** • What skills will they need? • What products do I expect? • What is the timeline for the consultant's involvement in the project?
Ask colleagues, trusted peers and other experts in the field for referrals **List potential candidates**	**Questions to Ask Colleagues** • Who have you used in the past that you were particularly satisfied with? • What were some of this person's strengths? Challenges?
Ask for and check references **Ask for related work samples**	**Questions to Ask of those providing reference information** • Did the consultant complete the project within the time frames and budget? • Did the quality of the product meet your expectations? • Would you hire the consultant again?
Interview Potential Consultants **Tool 11 - Interviewing Consultants**	**Questions to Ask of Candidates** • Develop customized questions for your project and ask them of each consultant. • Ask for work samples of products similar to those you are expecting.
Select Consultant(s) Finalize contracts Select design team Facilitate initial design team meeting **Tool 2 – Sample Agenda for Initial Design Team Meeting**	**Questions to Ask Yourself** • How can I best clarify and communicate with the consultants? • What do I want to accomplish in the initial design team meeting?

Tool 11 – Interviewing Consultants: Questions and Tips

Use this tool to develop questions that will help you select the best candidate for the project.

Subject Matter Expert	Trainer	Developer
Special Considerations - May need guidance in adult learning. Do you want them to help with curriculum content, training delivery, or both?	**Special Considerations** - The ideal is a highly skilled trainer that is also a subject matter expert.	
Describe your experience in this content area. Describe your experience as a trainer.	Describe your experience as a trainer.	What kind of model or framework do you use to develop training?
What is your understanding of the ITIP model?	What is your understanding of the ITIP model?	What is your understanding of the ITIP model?
What is your understanding of ADDIE?	What is your understanding of ADDIE?	What is your understanding of ADDIE?
Describe a consulting experience that you found especially fulfilling. And one that presented some specific challenges.	Describe a training experience that you found especially fulfilling. And one that presented some specific challenges.	Describe a consulting experience that you found especially fulfilling. And one that presented some specific challenges.

TIPS

- Roles on a design team can but don't necessarily overlap.
- The consultant may be able to fulfill more than one role; gather information regarding each role.
- Pair a Subject Matter Expert (SME)with a trainer to increase credibility.

Reference: Tool 6 – Forming a Curriculum Design Team

Tool 12 - Needs Assessment Planning Guide

Use this tool to work with a client (the requestor) to clarify the project purpose and focus.

Questions	What do you know?	What do you need to find out?	How will you find out?
What are potential trainees currently doing or using?			
How will the new approach be different? Similar? Better? (What is it designed to do?)			

How well is the current approach working? How do you or the client know?			
What does the target population know about the proposed changes?			
What are the target populations' thoughts and feelings about the change?			

Tool 13 – Evaluating Use of Instructional Strategies

Use this tool to evaluate and give feedback to the consultants on their use of strategies. You can also give the tool to the developer to use as a guide during the development process and as a means of formative self-evaluation.

	Anticipatory Set	Instructional Input	Guided Practice	Independent Practice	Evaluation	Learner Engagement
Lecture		*				
Lecture with visuals		*				
Lecture with questions		*				*
Open questions	*	*			*	*
Guided small group discussion	*	*	*		*	*
Case Study	*	*	*	*	*	*
Independent assignment	*	*	*	*	*	*
Small group project		*	*		*	*
Simulation		*	*		*	*
Role play			*	*	*	*
Video	*	*				
Reading assignment		*				*
Games	*				*	*
Demonstration by trainer	*	*				
Skill practice by learners			*	*	*	*

Frequently Asked Questions (FAQs)

ADDIE – Cycle Overview
Q: What if I am assigned the project after analysis has been completed?
A: You can enter the project at any point in the process.
Q: What if I am asked to update a curriculum rather than creating something new?
A: You can still follow the ADDIE model and can enter the process at any phase.

ADDIE – Analyze
Q: What if there isn't time to formally assess training needs?
A: Needs Assessment does not have to take a long time – a focus group of managers and representatives of the target group can be conducted at the beginning of the development process to determine the essential components for the topic.
Q: How do you know if training is the solution to the issue?
A: *Training is the solution if: the content is new – technique, approach, equipment, law; the target group has not been taught the desired skills previously; or the performance gap is due, at least in part, to lack of skill or knowledge.* (Training Needs Assessment, By Janice A. Miller, SPHR and Diana M. Osinski, SPHR, February 1996).

Q: What if the data gathered when assessing training needs indicates that training won't fill this gap? What are my options?

A: Communicate the results to the requestor and suggest other possibilities for the gap.

http://www.nwlink.com/~donclark/hrd/isd/assessment.html

Q: How do you determine how long training should be? (number of hours).

A: The length, format, instructional strategies you choose should tie back to your objectives. Ask the requestor how much time is available. If it is not enough to reach the desired objectives, develop an outline of objectives that can realistically be achieved in the given time-frame. Negotiate either for the modified outcome OR for more time.

ADDIE - Design

Q: What if you are updating an existing curriculum?

A: The Design Phase would still be invaluable. Review the existing curriculum and consider the efficacy of the learning outcomes, delivery modes, instructional strategies and evaluation plan in relation to new technologies and information.

Is the content outdated? Is there a more cost efficient way to deliver the curriculum? Are the learning objectives written to meet the current needs of the target audience?

Q: What if you need to give your Design Team suggestions about instructional strategies?

A: This link provides descriptions and guidelines for a variety for instructional strategies.

http://olc.spsd.sk.ca/DE/PD/instr/categ.html

ADDIE – Develop

Q: How do you know when you have a "completed package?

A: Tool 5 – Curriculum Review Checklists

Q: What if the consultants are not delivering the product as expected?

A: Reexamine expectations, timelines and work products; keep communication and feedback going.

ADDIE – Implement

Q: What if a trainer has to cancel?

A: Detailed, scripted lesson plans facilitate consistency and trainer preparation. A Training for Trainers prepares the training team members.

Q: What if a trainer is not prepared?

A: Clarify expectations with training team members. Schedule a training of trainers with coaching and walk-through.

Q: How and when do you give feedback to the design and training teams?

A: During the Develop Phase of ADDIE, schedule time to give feedback at regular intervals or milestones. Observe the pilot testing, taking notes for daily feedback sessions and a post training debriefing. Give feedback to the trainers and ask for their feedback regarding the "user friendliness" of the curriculum. Schedule a time to follow up with both the design and the training teams.

ADDIE – Evaluate

Q: What if the project did not address the gap?

A: Use evaluations to pinpoint causes. Was there a problem with the mode of delivery? Was there a problem with the quality of product? Were all the participants from the identified target population? Did the trainers stick to the lesson plan? Did participants' supervisors provide coaching and support? Make revisions as indicated to address gap.

ITIP – Overview

Q: What if there isn't time?

A: Learners need adequate time to learn and practice skills to promote transfer from the learning environment to the job. If time is limited, the learning can be broken down into smaller segments.

Q: What if it's a one-time presentation?
A: If it is a presentation-only session to introduce a new approach, pique interest or share information, a lesson plan is probably not necessary. If, however, the learners will be expected to use the information or skills in their work somehow, there should be a lesson plan written in the ITIP format.
Q: What if you are not sure how to analyze and evaluate a lesson plan for ITIP components?
A: This guide's for you!
Q: What if the SME isn't skilled in developing training using the components of ITIP?
A: Include the SME as part of the curriculum design team *and* part of the trainer team. Tool 6 – Forming a Curriculum Design Team
Q: What if the training is in e-learning format?
A: ITIP principles apply to any learning environment or format.

Anticipatory Set

Q: What if there isn't enough time?
A: The Anticipatory Set doesn't have to take much time. Building a trusting learning environment where learners feel safe to express themselves and try out new skills lessens resistance to learning and is thus a good investment of time. *Go slow* *to go fast.*
Q: What if the learners already know each other?
A: Adult learners need the opportunity to clarify expectations, to feel safe to try out new skills, to have others honor their topic-related experience and to connect what they are about to learn with what they already know. http://nicic.gov/Library/018534
Q: What if the skills are new – no one has previous knowledge or experience on this topic?
A: Adult learners bring a lot of life experience and often years of work experience to the learning setting. Their experience might be tangentially rather than directly related to what is being taught. Honoring and connecting with what they

already know helps adults more readily accept new information and skills and can guide the trainer(s) to assess outdated

or incorrect information.

Q: What if the lesson plan is written by a subject matter expert? Does it still need to be in ITIP format?

A: A curriculum design specialist can work with the SME to ensure that the lesson design is learner-centered. Participants

will learn best if they have a purpose for learning, feel connected to the other learners and the trainer, and can make the

connection between what they already know and what they will be expected to do differently as a result of the training.

Instructional Input

Q: What if there is a lot of new information and not much time?

A: For learners to be able to remember what is taught and use the new knowledge and skills *effectively* on the job,

information needs to be presented in small chunks, learners must be actively engaged and there must be frequent checks

for understanding.

Q: What if the target audience is so large that it necessitates large classes?

A: There are many ways to actively engage learners in the learning process, even in a large group. Example: Learners can

be instructed to work with a seat partner or with others at their table or in their group.

Q: What if the trainers are experienced and comfortable with lecture and PowerPoint but not with learner-centered

activities?

A: PowerPoint slides, as any visual aid, serve to support and enhance the learning but are not a substitute for the active

learning process. Trainers need to be skilled in facilitating learner-centered instruction.

Guided Practice

Q: What if there is not enough time for guided practice?

A: Without practice the training is likely to be a waste of time . . . or worse if the learners do not apply the skills correctly.

Practice helps refine skills through trainer observation, coaching and feedback. It builds learner confidence and reinforces

memory.

Q: If the learning objectives are at the knowledge or comprehension level, is practice still necessary?

A: For objectives at the comprehension or knowledge level, there is likely another way to get the information to learners (i.e. reading, video). If the learners will be expected to use this information and apply the skills on the job the objectives will be at the application level or higher, and participants will need practice.

Q: What if there are too many learners for the trainer to observe and provide coaching?

A: Limit the number of participants in each class; bring in additional trainers for observation and coaching; provide instructions for learners to observe and coach each other; engage supervisors in observing and coaching on the job.

Q: Is Guided Practice necessary for every section of Instructional Input?

A: Yes. The purpose of Instructional Input is to give learners information and skills they need in order to reach or achieve the learning objectives. The specific Guided Practice should be inherent in the action word or phrase in the learning objective. For example, learners would practice calculating, completing a form or report, interviewing.

Q: What if there is too much Guided Practice?

A: That's unlikely. While Guided Practice is always active participation, active participation is not always Guided Practice.

Q: How can you tell if an activity is Guided Practice?

A: Ask the following questions: What skills are learners practicing? How are they practicing use of knowledge? What is being observed or reviewed? What process is described for feedback and coaching? How does the activity reflect the action in the learning objective? (i.e. Are they being asked to complete a form, make a decision, plan a process, apply a technique, interview a client?)

Independent Practice

Q: What if there's not enough time or resources to conduct an Independent Practice in the training setting?

A: Although Independent Practice is best done through observation by and coaching from the learner's supervisor in the job setting, there are opportunities within the training setting to have learners think and work through work specific situations by using case studies and other activities drawn from real work examples. In addition, learners can complete

action plans to guide them in the transfer of learning.

Q: What if supervisors are not trained to observe and coach in the new skills?

A: Create a feedback system with the trainer and/or other class participants for support. Develop (or recommend to management) a supervisor track for this training that clarifies their role in the training process and that includes skill development in coaching and giving feedback.

Resources

This is a comprehensive list (by subject) of annotated links to additional information, charts, tools, guides and glossaries.

ADDIE	ADDIE Instructional Systems Design model chart http://www.nwlink.com/~donclark/hrd/sat.html In-depth information on each phase of ADDIE http://www.grayharriman.com/ADDIE.htm http://www.instructionaldesign.org/models/addie.html Learning concept map http://www.nwlink.com/~donclark/learning/learning.html
Training Needs Analysis	Needs assessment strategies http://www.nwlink.com/~donclark/analysis/analysis.html DACUM process – descriptions and guides for job and task analysis http://www.dacumohiostate.com/process.htm http://www.dacum.org/about.asp Sample DACUM profiles http://nicic.gov/Library/008894 http://www.dacum.org/example.asp
Budget	Guide for estimating costs and time in instructional design http://www.nwlink.com/~donclark/hrd/costs.html

Learning Objectives	Description of revised Bloom's Taxonomy http://www.thewritingsite.org/articles/vol4num3a.asp Guides for writing learning objectives, with examples http://www.nwlink.com/~donclark/hrd/templates/objectivetool.html http://managementhelp.org/trng_dev/lrn_objs.htm Using SMART to write learning objectives http://www.fenman.co.uk/cat/product_info/training_objectives.pdf
Learner-centered Training	Principles of learner-centered, active training http://www.nwlink.com/~donclark/hrd/learning/active.html Bag it! A Quick and Remarkably Easy Instructional Design Process http://www.bowperson.com/BOWPERSON/BagIt.pdf Learners Teaching Learners: A Powerful Way to Train http://www.bowperson.com/BOWPERSON/LearnersTeachLearners.pdf Guide and techniques for learning by interacting http://www.nwlink.com/~donclark/learning/interacting.html E-Learning essentials and tips for development http://www.grayharriman.com/e-learning.htm
Evaluation	Grid illustrating the basic Kirkpatrick training evaluation structure http://www.businessballs.com/kirkpatricklearningevaluationmodel.htm Details of and guide for implementing Kirkpatrick's training evaluation model http://www.nwlink.com/~Donclark/hrd/isd/kirkpatrick.html Evaluating e-learning http://www.fastrak-consulting.co.uk/tactix/features/evaluate/eval01.htm
Feedback	Tips for effective feedback http://www.managementhelp.org/commskls/feedback/basc_gde.htm http://humanresources.about.com/cs/communication/ht/Feedbackimpact.htm

Planning	Sample flow chart http://www.asq.org/learn-about-quality/process-analysis-tools/overview/flowchart.html Sample Gantt timeline chart http://www.netmba.com/operations/project/gantt/
Glossaries	Assessment glossary http://www.csus.edu/acaf/portfolios/ge/glossary.stm E- Learning glossaries http://www.uwex.edu/ics/design/glossary.htm http://www.about-elearning.com/e-learning-glossary.html Learning and performance glossary http://www.nwlink.com/~donclark/hrd/glossary.html
Resources for Trainers	NIC Library of Resources for Trainers http://nicic.gov/?q=trainers Collection of free information, templates, activities http://www.businessballs.com/freeonlineresources.htm

www.nicic.gov

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