

TRAINING AND DEVELOPMENT  
INSTRUCTOR'S MANUAL

**SHRM**<sup>TM</sup>  
SOCIETY FOR HUMAN  
RESOURCE MANAGEMENT

# Training Design, Development and Implementation

*By Myrna L. Gusdorf, MBA, SPHR*

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**Note to HR faculty and instructors:** SHRM cases and modules are intended for use in HR classrooms at universities. Teaching notes are included with each. *While our current intent is to make the materials available without charge, we reserve the right to impose charges should we deem it necessary to support the program.* However, currently, these resources are available free of charge to all. Please duplicate *only* the number of copies needed, one for each student in the class.

For more information, please contact:  
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# Introduction

## ABOUT THIS LEARNING MODULE

This learning module is intended to teach HR students the skills necessary to design, develop and implement a training program. This is a full-term module comprised of 10 units. It is anticipated that one unit is completed each week in two class periods, with class periods ranging from 50 to 90 minutes each.

The module is segmented into five parts. Part one, Introduction to Training and Development, is completed in the first class period. Part two, Understanding the Organization, begins at the second class period of the first week and runs through the completion of unit two. Part three, Training Design and the Learner, is the longest segment, starting at unit three and running through unit seven. Units eight and nine comprise the segment on Conducting the Training and the last unit, number 10, concludes the module with Evaluation and Return on Investment. The basic structure of the class follows the ADDIE method of instructional design.

## AUDIENCE

This learning module is appropriate for undergraduate students.

## MODULE LEARNING OBJECTIVES

Students will learn to:

- Analyze an organization by conducting a SWOT analysis.
- Conduct a needs assessment to determine the training needs of the organization.
- Use the ADDIE method of instructional design to design training that meets the organization's strategic goals.
- Develop learning activities that incorporate adult learning principles and methods of experiential learning.
- Develop a training budget.
- Conduct a training program.

- Evaluate the training program in light of the training objectives established in the needs assessment process and the strategic goals of the organization.
- Analyze the organization's return on investment for the completed training program.

### REQUIRED TEXTS

Noe, R. (2008). *Employee training and development*. New York: McGraw-Hill, Irwin.

Silberman, M. (2006). *Active training: A handbook of techniques, designs, case examples, and tips*. San Francisco: Pfeiffer/John Wiley & Sons, Inc.

### POWERPOINT SLIDES

PowerPoint slides for the 10 units of the learning module are included with comments for the instructor.

### STUDENT PROJECT

Instructions are included for a student team project. The project is designed to be completed by a team of three to four students, but if the class is small and time allows, it could be done as an individual student project. The project requires students to select an organization, then design, develop and implement a training program for that organization. Students will submit periodic written assignments based on the development of their project and present their training project to the class. Each unit includes instructions for the corresponding segment of the project. In addition, there is a "Team Training Project" handout for students, with project instructions included. It is suggested that students be allowed as much class time as possible to work with their teams, but the instructor must remind students that they should expect to meet regularly with their teams outside of class since it is unlikely they will be able to complete the project without additional meetings outside of class time.

# Part I: Introduction to Training

## **Unit 1: Introduction to the Class and Overview of Training and Development**

In the first class, the instructor should introduce students to the course and outline expectations regarding attendance, assignments, academic integrity, etc. The first unit introduces basic information regarding training and development (T&D) and discusses how T&D has changed since businesses began to recognize the value of human capital and started placing more emphasis on employee training. Students should be introduced to the group process model because they will be assigned to a group project for the duration of the class. By the end of this first unit, students should have established their teams and identified the organizations they will use for their training project.

### **Unit 1: Learning Objectives**

By the end of Unit 1, students will:

- Distinguish the difference between training and development.
- Summarize factors that have changed the emphasis of training in organizations.
- Actively participate in a team project.
- Identify an organization for application of their team project.

### **Unit 1: Content Outline**

- I. Introduction to the course:**
  - a. Course objectives.
  - b. Parameters and expectations.
- II. The training and development process:**
  - a. ADDIE model.
- III. Group development:**
  - a. Group formation.
  - b. Group roles.
- IV. What gives value to an organization:**
  - a. Financial assets.
  - b. Physical assets.
  - c. Human capital.

**V. Traditional training vs. contemporary training.**

**VI. Team project:**

- a. Establish team.
- b. Select a business organization for team project.

**Unit 1: Assigned Reading**

Noe: Chapter 1.

Silberman: Introduction.

**Unit 1: Student Project**

In this class, students will work with a group of three to four students to develop and present a training module to the class. Groups will be formed during the first week of class, and the first assignment is to select an organization for the project. Students should assume that they are independent training consultants and that the organization has contacted them to conduct an assessment of training needs and to design and provide the necessary training to its employees. By the end of the first week, students should submit the names of their team members and the name of their selected organization.

Web sites with information on group formation and group process:

- George Mason University, [www.gmu.edu/student/csl/leadership/5stages.html](http://www.gmu.edu/student/csl/leadership/5stages.html)
- Chimaera Consulting, [www.chimaeraconsulting.com/tuckman.htm](http://www.chimaeraconsulting.com/tuckman.htm)

# Part II: Understanding the Organization

## Unit 2: Training and the Organization's Strategic Plan

Effective training is not an isolated event in an organization. Training must be strategic in that it is designed to improve the knowledge, skills and abilities of employees to help them achieve the organization's strategic plan. Therefore, effective training cannot be designed until we first understand the organization. This is done by conducting a SWOT analysis to determine the strengths, weaknesses, opportunities and threats to the organization. With this information and an understanding of the organization's vision, effective training creates a competitive advantage for the organization. After completing the SWOT analysis, a training needs assessment is conducted to identify the gaps between the employees' actual performance and desired performance. Careful analysis of performance gaps determines what training needs to be done or if there is a need for training at all. In some cases, the performance gaps are not related to training deficiencies and other interventions may be needed.

## Unit 2: Learning Objectives

By the end of Unit 2, students will:

- Explain the various elements of a strategic plan.
- Describe how the organization's strategic plan should influence training.
- Conduct a SWOT analysis.
- Explain the training needs created by business strategies.
- Distinguish between needs assessment and needs analysis.
- Identify the purposes of needs assessment and needs analysis.
- Identify data collection methods.
- Conduct a needs assessment.
- Determine from assessment whether training is the best solution to the problem.

## Unit 2: Content Outline

- I. **Strategic planning:**
  - a. Mission, vision and values.
  - b. Action plans and evaluation.

- II. **Linking training to the strategic plan:**
  - a. Training as a competitive advantage.
  
- III. **Why the emphasis on training:**
  - a. Support business goals.
  - b. Unpredictable business environment.
  
- IV. **Knowledge transfer:**
  - a. Explicit knowledge = formal training.
  - b. Tacit knowledge = informal training.
  
- V. **Understanding the organization/SWOT analysis.**
  
- VI. **Instructional design:**
  - a. The ADDIE model.
  
- VII. **Needs assessment and needs analysis.**
  
- VIII. **Pre-assessment activities:**
  - a. Triggering event.
  - b. Goals of the needs assessment.
  - c. Participants in the needs assessment.
  
- IX. **Methods of needs assessment.**
  
- X. **Needs assessment process:**
  - a. Organizational analysis.
  - b. Person analysis.
  - c. Task analysis.
  
- XI. **Needs analysis: gap analysis.**
  
- XII. **Determining whether training is the best solution:**
  - a. Skill or knowledge deficiency.
  - b. Issues not solved by training.
  
- XIII. **Team project.**

## **Unit 2: Assigned Reading**

Noe: Chapter 2.

Silberman: Chapter 1.



## Unit 2: Student Project

Instructions to the students: Identify the mission, vision and values of your organization. Conduct a SWOT analysis of the business. Discuss the strengths, weaknesses, opportunities and threats to this organization. What is the organization's vision? Where does the organization want to be in three to five years? What does this say about the training that may be necessary for its employees? As a training consultant, what training would you suggest that reflects the organization's strategic plan? Submit your SWOT analysis paper as indicated by your instructor.

Web sites with information and diagrams on SWOT analysis:

- Planware, [www.planware.org/strategicplanner.htm](http://www.planware.org/strategicplanner.htm)
- Mplans.com, [www.mplans.com/cm/print.cfm?i=148](http://www.mplans.com/cm/print.cfm?i=148)

# Part III: Training Design and the Learner

## Unit 3: Adult Learning Principles and Implications for Training

Educators have understood pedagogy, the process of helping children learn, for a long time. It wasn't until 1970, however, when Malcolm Knowles coined the word *andragogy* to describe how adults learn, that we really started to think about how adult learning differs from the way children learn. Adults bring specific characteristics to the learning environment. They have life experiences that they want incorporated into their learning. They are motivated to learn when they have a problem to solve. Therefore, they are more interested in the specifics of a topic than in its generalities. For adults, being a learner is often not their primary role; it is secondary to their other life obligations. Combine these adult learner characteristics with their various learning styles, add a sprinkling of learning theories, and the result is a complicated mix that trainers must consider for the training to be well received and meet the needs of the adult audience.

## Unit 3: Learning Objectives

By the end of Unit 3, students will:

- Define andragogy.
- Define learning as a change in behavior or cognitive process.
- Describe characteristics of adult learners.
- Describe principles of adult learning.
- Apply principles of adult learning to training.
- Incorporate learning styles into training activities.

## Unit 3: Content Outline

- I. **Andragogy.**
- II. **Adult learning theory.**
- III. **Characteristics of adult learners.**
- IV. **Learning outcomes:**
  - a. Verbal information.
  - b. Intellectual skills.
  - c. Motor skills.

- d. Attitudes.
- e. Cognitive strategy.

**V. Learning cycle:**

- a. Concrete experience.
- b. Reflective observation.
- c. Abstract conceptualization.
- d. Active experimentation.

**VI. Learning styles (Kolb):**

- a. Diverger.
- b. Assimilator.
- c. Converger.
- d. Accommodator.

**VII. The learning process.**

**VIII. Learning theories:**

- a. Reinforcement.
- b. Social learning.
- c. Goal theories.
- d. Need theory.
- e. Expectancy.
- f. Information processing.

**IX. Applying learning theory to training.**

**Unit 3: Assigned Reading**

Noe: Chapter 4.

**Unit 3: Student Project**

Instructions to students: Design the necessary needs assessment instruments for your organization. Conduct the needs assessment and analyze the results. What training needs have you identified? Who is the training audience? Are there other issues identified that are not training issues? What would you suggest to the organization regarding the non-training issues? Submit your needs assessment instruments and analyses as directed by your instructor.

Suggested additional student reading:

- Miller, J. A., & Osinski, D. M. (1996, 2002). *Training needs assessment* [SHRM White Paper]. Retrieved from [www.shrm.org/Research/Articles/Articles/Pages/CMS\\_000445.aspx](http://www.shrm.org/Research/Articles/Articles/Pages/CMS_000445.aspx)

Web sites with information on learning styles:

- BusinessBalls.com, [www.businessballs.com/kolblearningstyles.htm](http://www.businessballs.com/kolblearningstyles.htm)
- Indiana University of Pennsylvania, [www.coe.iup.edu/rjl/instruction/cm150/selfinterpretation/kolb.htm](http://www.coe.iup.edu/rjl/instruction/cm150/selfinterpretation/kolb.htm)

Web sites with information on adult learning principles:

- Calliope Learning, [www.calliopelearning.com/resources/papers/adult.html](http://www.calliopelearning.com/resources/papers/adult.html)
- New Horizons for Learning, [www.newhorizons.org/lifelong/workplace/billington.htm](http://www.newhorizons.org/lifelong/workplace/billington.htm)

#### **Unit 4: Training Objectives and the Training Budget**

If training is to add value to the organization, effective learning objectives must reflect the organization's strategic focus. From these objectives, specific learning goals are established that define the actions that must take place within the three learning domains for learning to be accomplished. Training goals give us direction for training content and establish the parameters for how to assess accomplishments. They become the overarching roadmap for the training project.

#### **Unit 4: Learning Objectives**

By the end of Unit 4, students will:

- Distinguish goals from objectives.
- Write SMART goals for training.
- Align training objectives to meet the needs of the learners.
- Write training objectives that align with the organization's strategic plan.
- Describe the link between training and learning domains.

#### **Unit 4: Content Outline**

- I. **Setting training goals and objectives.**
- II. **The learning process.**
- III. **Learning domains:**
  - a. Cognitive.
  - b. Psychomotor.
  - c. Affective.

**IV. Bloom's taxonomy and the three learning domains:**

- a. Knowledge.
- b. Comprehension.
- c. Application.
- d. Analysis.
- e. Evaluation.
- f. Create/invent.

**V. Writing SMART objectives.**

**VI. Goals and objectives that apply to learning domains.**

**VII. Establishing the training budget:**

- a. Fixed costs.
- b. Variable costs.
- c. Direct costs.
- d. Indirect costs.

**VIII. FLSA: Are employees paid for training time?**

**IX. Training costs.**

**X. Student project: Prepare a training budget.**

**Unit 4: Assigned Reading**

Noe: Chapter 4.

Silberman: Chapters 2 and 7.

**Unit 4: Student Project**

Instructions to students: Write SMART objectives for your training. Ensure your objectives reflect the strategic focus of your organization. Write learning goals that encompass all three learning domains. Prepare a budget for your training program. Submit your training objectives and your proposed budgets as directed by your instructor.

Web sites with information on learning domains and writing objectives:

- Don Clark, [www.nwlink.com/~donclark/hrd/bloom.html](http://www.nwlink.com/~donclark/hrd/bloom.html)
- College of the Sequoias, [www.cos.edu/view\\_page.asp?nodeid=3870&parentid=3867&moduleid=1](http://www.cos.edu/view_page.asp?nodeid=3870&parentid=3867&moduleid=1)

A simple budget template can be found on the Microsoft web site at <http://office.microsoft.com/en-us/templates/TC011443541033.aspx>

## Unit 5: Developing the Training Program

Training design begins with the decisions made in the needs analysis process and ends with a model for the training program. Using learning objectives as a guide, trainers must determine what content to include in the curriculum, how detailed the content should be and how it is to be presented. From these decisions, a lesson plan is created and training materials are developed. Appropriate training materials must address various learning styles and incorporate student assessment in the learning process.

## Unit 5: Learning Objectives

By the end of Unit 5, students will:

- Develop training content following instructional system design.
- Develop training content to accomplish the learning objectives.
- Scope and sequence content according to the objectives.
- Describe various logical sequencing techniques.
- Develop a lesson plan.
- Create appropriate visual aids for presentations.

## Unit 5: Content Outline

- I. **Program design:**
  - a. Course parameters.
  - b. Course objectives.
  - c. Detailed lesson plan.
  - d. Evaluation.
- II. **Content derivation:**
  - a. Relationship between objectives, content and evaluation.
- III. **Evaluation of student learning:**
  - a. Criterion-referenced test.
  - b. Performance test.
  - c. Attitude survey.
- IV. **Scope of content: How extensive is the content?**
- V. **Sequence: How should the content be presented?**
- VI. **Writing the lesson plan:**
  - a. Lesson plan overview.
  - b. Detailed lesson plan.

VII. **Effective visual aids.**

VIII. **Student handouts.**

IX. **Creating PowerPoint slides:**

- a. Structure.
- b. Font.
- c. Color.
- d. Images.
- e. Citing references.
- f. Animation.
- g. Timing of presentation.
- h. Using illustrations.

X. **Reference citations.**

XI. **Team project: Developing training content.**

### **Unit 5: Assigned Reading**

Noe: Chapter 4.

Silberman: Chapters 8 and 9.

### **Unit 5: Student Project**

Instructions to students: Using information derived in the needs analysis, identify and develop the content for your training program. What will you include? As you develop content, consider how you will evaluate student learning. What training methods will you use? How are the training methods you chose related to the needs of the learners? Submit your discussions of training methods and content outlines as directed by your instructor.

### **Unit 6: Training Methods, Experiential Learning and Technology in Training**

Continuing content development from the previous unit, trainers must determine the best method of presenting the training to the learners. Trainers have typically used traditional training methods, which include lecture presentation, on-the-job training and group activities. However, as employers look to maximize their training dollars, many are moving away from traditional training and incorporating e-learning into their training environment. This can be done by using computer-based training modules, virtual classrooms, message boards, etc. Training may be entirely computer-based with 24/7 availability, or it may be a blended environment that incorporates the traditional classroom experience with part of the training presented online. When deciding what approach to use, the trainer must consider the nature of the training content, the needs of the learners and the technology available. As with any training program, for online learning to be successful, it must

be supported by management, and management must be willing to provide the technical resources necessary for successful implementation.

### **Unit 6: Learning Objectives**

By the end of Unit 6, students will:

- Describe the experiential learning cycle.
- Apply the experiential learning cycle in an activity.
- Apply learning criteria in choosing teaching methods and activities.
- Identify and use elements of effective e-learning.
- Choose appropriate methods and activities for training.

### **Unit 6: Content Outline**

- I. Training methods:**
  - a. Traditional training.
  - b. Technology-based training.
  - c. Blended learning.
- II. Training methods:**
  - a. Presentation methods.
  - b. Hands-on learning.
  - c. Group building methods.
- III. Experiential training/experiential learning cycle (Kolb):**
  - a. Concrete experience.
  - b. Observation and reflection.
  - c. Forming abstract concepts.
  - d. Testing in new situations.
- IV. The Cone of Learning (Dale).**
- V. Advantages and disadvantages of training methods.**
- VI. Determining the best method of training.**
- VII. Using e-learning:**
  - a. Organization benefits.
  - b. Learner benefits.
  - c. Asynchronous.
  - d. Synchronous.
- VIII. Levels of technology-based training.**



IX. **Effective e-learning.**

X. **Selecting the appropriate training design:**

- a. Traditional classroom.
- b. E-learning.
- c. Blended learning.

### **Unit 6: Assigned Reading**

Noe: Chapters 7 and 8.

Silberman: Chapters 4, 5, 6 and 10.

### **Unit 6: Student Project**

Instructions to students: Write a detailed lesson plan incorporating experiential learning methods.

For more information on training plans, see:

- Free Management Library, [www.managementhelp.org/trng\\_dev/gen\\_plan.htm](http://www.managementhelp.org/trng_dev/gen_plan.htm)

For more information on experiential learning, see:

- Atherton, J. S. (2005). *Learning and teaching: Experiential learning*. Retrieved September 10, 2008, from [www.learningandteaching.info/learning/experience.htm](http://www.learningandteaching.info/learning/experience.htm)

### **Unit 7: Transfer of Training: SHRM Module by Hutchins and Burke**

Unit 7 uses the SHRM learning module *Transfer of Training* by Holly Hutchins, Ph.D., and Lisa A. Burke, Ph.D., SPHR. To access this module, go to [www.shrm.org/education/hrededucation/pages/cases.aspx](http://www.shrm.org/education/hrededucation/pages/cases.aspx). Scroll down the page and click on “Transfer of Training.”

Training transfer means that learners are able to transfer the knowledge and skills learned in a training session back to their jobs. The importance of training transfer cannot be overemphasized; organizations spend billions of dollars each year on training, yet only a fraction of that investment results in improved performance, particularly if training transfer is not supported by the employer. Effective training design incorporates learning goals and adult learning principles that enhance successful transfer, ultimately leading to improved individual and organizational performance.

### **Unit 7: Learning Objectives**

By the end of Unit 7, students will:

- Define transfer of training and the primary theories of transfer.
- Discuss the role and importance of transfer in evaluating training outcomes.

- Discuss three factors that affect transfer and learner performance.
- Discuss how transfer can be supported before, during and after training.
- Identify key stakeholders to support transfer strategies.

## **Unit 7: Content Outline**

- I. **Key terms and definitions.**
- II. **Transfer-of-training theories:**
  - a. Identical elements theory.
  - b. Stimulus generalization theory.
  - c. Cognitive theory.
- III. **Training evaluation process (Kirkpatrick):**
  - a. Reaction.
  - b. Learning.
  - c. Transfer.
  - d. Results.
- IV. **Class 1 activity and summary.**
- V. **Review and discussion.**
- VI. **Training transfer model:**
  - a. Learner characteristics.
  - b. Training design.
  - c. Work environment.
- VII. **Support of transfer and transfer strategies.**
- VIII. **Activity and summary.**
- IX. **Stakeholder support of transfer.**
- X. **Obstacles to transfer.**
- XI. **Transfer matrix.**
- XII. **Activity scenario.**
- XIII. **Review and summary.**

## Unit 7: Assigned Reading

Noe: Chapter 5.

Silberman: Chapter 16.

## Suggested Additional Reading

Broad, M.L. (2005). *Beyond transfer of training: Engaging systems to improve performance*. San Francisco: John Wiley & Sons.

## Unit 7: Student Project

Instructions to students: Design training activities and visual aids for your presentation. Ensure your training content incorporates methods that facilitate transfer of training. Consider how you will measure transfer after the training is concluded. Submit sample training activities and visual aids as instructed. Include comments about how your planned instruction will accomplish transfer of training.

Web site with information on transfer of training:

- Don Clark.com, [www.nwlink.com/~donclark/hrd/learning/transfer.html](http://www.nwlink.com/~donclark/hrd/learning/transfer.html)

# Part IV: Conducting the Training

## Unit 8: Implementing Training and Presentation Skills

A great deal of preparation takes place long before the actual training begins. Trainers must plan for the location of training, the room layout, audience needs, handouts and presentation media, and myriad other details that must all be arranged in advance. Of particular importance is the room selected for training. It must be large enough to be comfortable for trainees and be arranged in a manner that facilitates the type of training to be conducted. In addition to working out the implementation details of training, the trainer must prepare and rehearse for the presentation. Even the best possible training design can result in failure if not properly implemented and skillfully presented.

## Unit 8: Learning Objectives

By the end of Unit 8, students will:

- Identify key tasks that are done to prepare for training.
- Determine appropriate room layout for training.
- Prepare a program outline.
- Create an effective PowerPoint presentation.
- Conduct an effective training presentation.

## Unit 8: Content Outline

- I. **Planning the training:**
  - a. Audience.
  - b. Space.
- II. **Room layout:**
  - a. Classroom.
  - b. Conference.
  - c. Horseshoe.
  - d. Fan.
- III. **Implementation.**
- IV. **Selecting a trainer.**

- V. **Details.**
- VI. **Effective presentation skills:**
  - a. Audience.
  - b. Prepare and practice.
- VII. **Getting started.**
- VIII. **Delivery:**
  - a. Voice.
  - b. Body language.
  - c. Listening.
  - d. Answering questions.
  - e. Nerves.
- IX. **Answering questions: Do's and don'ts.**
- X. **Closure:**
  - a. Summary.
  - b. Transfer of training.
  - c. Assessment.
- XI. **Team project: Lesson plan and presentation practice.**

### **Unit 8: Assigned Reading**

Silberman: Chapters 11, 12, 13, 14 and 15.

### **Unit 8: Student Project**

Instructions to students: Submit your completed lesson plans as directed by your instructor. Practice for your presentation.

For tips and techniques for effective presentations, see:

- [www.presentationkills.info/presentationkills.htm](http://www.presentationkills.info/presentationkills.htm)

### **Unit 9: Student Presentations**

During Unit 9, students will be presenting their training projects to their classmates. In addition to assessment by the instructor, it is suggested that the trainees (the classmates in the audience) assess the trainers' presentation. This will give students a greater variety of feedback than just that from the instructor. It is also recommended that students assess team members on their contribution to the group project. The appendix at the end of this document includes presentation assessment instruments.

# Part V: Evaluation

## Unit 10: Evaluation and Return on Investment

Evaluation and analysis are the last step in the ADDIE training model. This gives trainers an opportunity to go back to the beginning and assess the results of the training cycle. Organizations invest millions of dollars in training programs, and organizations want to see a positive return for the money spent. As a result, training managers are increasingly being asked to justify their expenses and demonstrate how training dollars increase the organization's bottom line. The problem is that some benefits derived from training can be intangible and difficult to quantify. How do you measure and put a dollar value on increased morale or better teamwork? Consequently, gathering and compiling the information needed for an accurate benefit/cost analysis can be a complicated task.

## Unit 10: Learning Objectives

By the end of Unit 10, students will:

- Determine the benefits of a training program.
- Calculate benefit-cost ratio.
- Calculate return on investment (ROI).
- Identify when ROI evaluation is not appropriate.
- Use other methods to verify training value when ROI is not appropriate.

## Unit 10: Content Outline

- I. **Reluctance to evaluate.**
- II. **Training evaluation:**
  - a. Formative evaluation.
  - b. Summative evaluation.
  - c. Evaluation process.
- III. **Kirkpatrick's model of evaluation:**
  - a. Level 1: Reaction.
  - b. Level 2: Learning.
  - c. Level 3: Behavior.
  - d. Level 3: Results.

- IV. **Benefit-cost ratio:**
  - a. Calculation.
- V. **Return on investment:**
  - a. Calculation.
- VI. **Determining training benefits:**
  - a. Quantifiable.
  - b. Intangible.
- VII. **Programs best suited for ROI analysis.**
- VIII. **When ROI isn't appropriate.**
- IX. **Link training to organization success.**
- X. **Team project: Training evaluation and ROI.**

#### **Unit 10: Assigned Reading**

Noe: Chapter 6.

Silberman: Chapter 17.

#### **Unit 10: Student Project**

Instructions to students: Design evaluation instruments using all four of Kirkpatrick's levels of evaluation. Write an evaluation of your training. This should be a summary of results that you would present to the organization that hired you. Did you meet the original learning objectives? Discuss how you will determine if transfer of training is accomplished. Discuss ROI in terms of your training project. How will you measure ROI? Was the training cost-effective for the organization? Remember, if your training doesn't generate measurable value to the organization, management will be less supportive of training in the future and your career as a training manager may be brief! Submit your training evaluation and ROI analysis to your instructor as directed.

Web sites with more information on Kirkpatrick's evaluation model:

- Businessballs.com: [www.businessballs.com/kirkpatricklearningevaluationmodel.htm](http://www.businessballs.com/kirkpatricklearningevaluationmodel.htm)
- The University of Georgia: <http://fsjones.myweb.uga.edu/evaluation/index.html>
- Don Clark.com: [www.nwlink.com/~donclark/hrd/sat6.html](http://www.nwlink.com/~donclark/hrd/sat6.html)

# References for Training and Development

## Unit 1

American Society for Training and Development: [www.astd.org](http://www.astd.org)

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# Team Training Project

## Unit 1: Introduction to Training

In this class you will be working with a group of three to four students to develop and present a training module to your classmates. Groups will be formed within the first week of class, and your first assignment will be to select a business organization for your project. Assume that you are independent training consultants and the organization contacted you to conduct an assessment of its training needs and to design and provide the necessary training to its employees. Submit the names of your team members and the name of your organization as indicated by your instructor.

Web sites with information on group formation and group process:

- George Mason University: [www.gmu.edu/student/csl/leadership/5stages.html](http://www.gmu.edu/student/csl/leadership/5stages.html)
- Chimaera Consulting: [www.chimaeraconsulting.com/tuckman.htm](http://www.chimaeraconsulting.com/tuckman.htm)

## Unit 2: Understanding the Business Organization

Identify the mission, vision and values of your organization. Conduct a SWOT analysis of the business. Discuss the strengths, weaknesses, opportunities and threats to this organization. What is the vision of the organization? Where does the organization want to be in three to five years? What does this say about the training that may be necessary for its employees? As a training consultant, what training would you suggest that reflects the organization's strategic plan? Submit your SWOT analysis paper as indicated by your instructor.

Web sites with information and diagrams on SWOT analysis:

- Planware.org: [www.planware.org/strategicplanner.htm](http://www.planware.org/strategicplanner.htm)
- Mplans.com: [www.mplans.com/cm/print.cfm?i=148](http://www.mplans.com/cm/print.cfm?i=148)

## Unit 3: Adult Learning Principles and Implications for Training

Design the necessary needs assessment instruments for your organization. Conduct the needs assessment and analyze the results. What training needs have you identified? Who is the training audience? Are there other issues identified that are not training issues? What would you recommend to the organization regarding the non-training issues? Submit your needs assessment instruments and analysis as directed by your instructor.

Suggested additional student reading:

- Miller, J. A., & Osinski, D.M. (1996, 2002). *Training needs assessment* [SHRM White Paper]. Retrieved from [www.shrm.org/Research/Articles/Articles/Pages/CMS\\_000445.aspx](http://www.shrm.org/Research/Articles/Articles/Pages/CMS_000445.aspx)

Web sites with information on learning styles:

- BusinessBalls.com, [www.businessballs.com/kolblearningstyles.htm](http://www.businessballs.com/kolblearningstyles.htm)
- Indiana University of Pennsylvania, [www.coe.iup.edu/rjl/instruction/cm150/selfinterpretation/kolb.htm](http://www.coe.iup.edu/rjl/instruction/cm150/selfinterpretation/kolb.htm)

Web sites with information on adult learning principles:

- Calliope Learning, [www.calliopelearning.com/resources/papers/adult.html](http://www.calliopelearning.com/resources/papers/adult.html)
- New Horizons for Learning, [www.newhorizons.org/lifelong/workplace/billington.htm](http://www.newhorizons.org/lifelong/workplace/billington.htm)

#### **Unit 4: Training Design and Learning Domains**

Write SMART objectives for your training. Make sure your objectives reflect the strategic focus of the organization. Write learning goals that encompass all three learning domains. Prepare a budget for the training program. Submit your training objectives and proposed budget as directed by your instructor.

Web sites with information on learning domains and writing objectives:

- Don Clark, [www.nwlink.com/~donclark/hrd/bloom.html](http://www.nwlink.com/~donclark/hrd/bloom.html)
- College of the Sequoias, [www.cos.edu/view\\_page.asp?nodeid=3870&parentid=3867&moduleid=1](http://www.cos.edu/view_page.asp?nodeid=3870&parentid=3867&moduleid=1)

A simple budget template can be found on the Microsoft web site at <http://office.microsoft.com/en-us/templates/TC011443541033.aspx>

#### **Unit 5: Training Content/Scope and Sequence**

Using information derived from the needs analysis, identify and develop the content for your training program. What will you include? As you develop content, consider how you will evaluate student learning. What training methods will you use? How are the training methods related to the needs of the learners? Submit your discussion of training methods and outline of content as directed by your instructor.



## **Unit 6: Training Methods and Experiential Learning**

Write a detailed lesson plan incorporating experiential learning methods.

For more information on training plans, see [www.managementhelp.org/trng\\_dev/gen\\_plan.htm](http://www.managementhelp.org/trng_dev/gen_plan.htm).

For more information on experiential learning, see [www.learningandteaching.info/learning/experience.htm](http://www.learningandteaching.info/learning/experience.htm).

## **Unit 7: Transfer of Training**

Design training activities and visual aids for your presentation. Ensure your training content incorporates methods that facilitate transfer of training. Consider how to measure transfer of training after the training is concluded. Submit sample training activities and visual aids to your instructor. Include comments about how your planned instruction will accomplish transfer of training.

For more information on transfer of training see [www.nwlink.com/~donclark/hrd/learning/transfer.html](http://www.nwlink.com/~donclark/hrd/learning/transfer.html).

## **Unit 8: Presentation Skills**

Submit your completed lesson plan to your instructor. Practice for your presentation.

For tips and techniques for effective presentations, see [www.presentationkills.info/presentationkills.htm](http://www.presentationkills.info/presentationkills.htm).

## **Unit 9: Student Presentations**

## **Unit 10: Training Evaluation and Return on Investment**

Design evaluation instruments using all four of Kirkpatrick's levels of evaluation. Write an evaluation of your training. This should be a summary of results that you would present to the organization that hired you. Did you accomplish the original learning objectives? Discuss how you will determine if transfer of training is successful. Discuss ROI in terms of your training project. How will you measure ROI? Was the training cost-effective for the organization? Remember, if your training doesn't generate measurable value to the organization, management will be less supportive of training in the future and your career as a training manager may be brief! Submit your training evaluation and ROI analysis to your instructor.

Web sites with more information on Kirkpatrick's evaluation model:

- BusinessBalls.com: [www.businessballs.com/kirkpatricklearningevaluationmodel.htm](http://www.businessballs.com/kirkpatricklearningevaluationmodel.htm)
- University of Georgia: <http://fsjones.myweb.uga.edu/evaluation/index.html>
- DonClark.com: [www.nwlink.com/~donclark/hrd/sat6.html](http://www.nwlink.com/~donclark/hrd/sat6.html).

Note to instructor: Rubrics for this team training project begin on the next page.

# Student Assessment of Team Members

Team Member: \_\_\_\_\_ Score: \_\_\_\_\_ Workload: \_\_\_\_\_

- Did a full share of the work or more; knows what needs to be done and does it; volunteered to help others. .... 4
- Did an equal share of the work; does work when asked; works hard most of the time. .... 3
- Did almost as much work as others; seldom asks for help. .... 2
- Did less work than others; doesn't get caught up after absence; doesn't ask for help. .... 1

**Organization:**

- Took the initiative proposing meeting times and getting the group organized. .... 4
- Worked agreeably with partners concerning times and places to meet. .... 3
- Could be coaxed into meeting with other partners. .... 2
- Did not meet partners at agreed times and places. .... 1

**Participation:**

- Provided many good ideas for the project; inspired others; clearly communicated ideas and suggestions. .... 4
- Participated in discussions, shared feelings and thoughts. .... 3
- Listened mainly; on some occasions made suggestions. .... 2
- Seemed bored with conversations about the project; rarely spoke up; ideas were off the mark. .... 1

**Deadlines:**

- Work was ready on time or sometimes ahead of time. .... 4
- Work was ready very close to the agreed time. .... 3
- Work was usually late but was completed in time to be graded. .... 2
- Some work never got completed and other partners completed the assignment. .... 1

**Meetings:**

- Showed up for meetings punctually, sometimes ahead of time. .... 4
- Showed up for meetings on time. .... 3
- Showed up late, but it wasn't a big problem for completing work. .... 2
- No-show or extremely late; feeble or no excuse offered. .... 1

Adapted from Frandsen, B. (2004). *Participation rubric for group development*. Retrieved March 6, 2009, from [www.niu.edu/assessment/Toolkit/vol7\\_ish2.pdf](http://www.niu.edu/assessment/Toolkit/vol7_ish2.pdf)

## Evaluation of Training Presentation

Group or Topic \_\_\_\_\_ Score \_\_\_\_\_

### Organization

- Extremely well organized; good introduction, logical sequence, ends with accurate conclusion. .... 4
- Generally well organized; some introduction, most information is logical, ends with summary of main points. .... 3
- Somewhat organized; presenter jumps around topics; points are confusing; inadequate summary. .... 2
- Poor organization; does not introduce purpose of presentation; choppy and disjointed; no summary. .... 1

### Content

- Accurate and complete; includes application of theory; level of presentation is appropriate for audience. .... 4
- Concepts and theories are mostly complete and accurate; level of presentation is generally appropriate. .... 3
- Explanations are inaccurate or incomplete; little or no tie to theory; too elementary or too sophisticated. .... 2
- Confusing explanations; no evident theory; presentation consistently too elementary or too sophisticated. .... 1

### Creativity

- Very original, clever and creative approach that captures audience's attention. .... 4
- Some originality apparent, good variety, clever at times. .... 3
- Little or no variation, a few original touches, but mostly little originality or interpretation. .... 2
- Bland and predictable, lacked zip, repetitive with little or no variety. .... 1

### Use of Media

- Graphics reinforce presentation and maximize audience understanding; professionally prepared. .... 4
- Graphics not as well connected to presentation as desired; some material is not supported by visuals. .... 3
- Communication aids are poorly prepared or used inappropriately; too much information included. .... 2
- Superfluous graphics, no graphics or graphics that are poorly prepared and detract from presentation. .... 1

### Delivery

- Poised, clear articulation, appropriate volume, professional demeanor, enthusiasm and confidence .... 4
- Clear articulation, not as polished, slightly uncomfortable at times, most can hear presentation. .... 3
- Presenter is uncomfortable, audience has trouble hearing, little or no enthusiasm for the topic. .... 2
- Presenter obviously anxious and cannot be heard or is monotone with little or no expression. .... 1

### Personal Appearance

- Professional look; completely appropriate for the occasion and the audience. .... 4
- For the most part, appearance is appropriate for the occasion and the audience. .... 3
- Personal appearance is somewhat inappropriate for the occasion and the audience. .... 2
- Personal appearance is unprofessional, inappropriate for the occasion and the audience. .... 1

**Audience Interaction**

Encourages audience interaction, calls classmates by name, responds confidently and appropriately. .... 4  
Encourages audience interaction, responds appropriately but fails to elaborate. .... 3  
Interacts with audience reluctantly, demonstrates some knowledge of simple questions. .... 2  
Avoids or discourages audience participation, responds inaccurately with incomplete knowledge of the topic. .... 1

**Audience Response**

Involved audience in the presentation; held audience’s attention throughout. .... 4  
Presented facts with interesting twists; held audience’s attention most of the time. .... 3  
Presented some related facts but went off topic and lost the audience. .... 2  
Presentation was difficult to follow; audience lost interest. .... 1

**Time**

Presentation was complete and stayed within time allowed. .... 4  
With minor adjustments, the presentation adhered closely to the allotted time. .... 3  
Presentation didn’t fit the time; content adjustments were awkward and didn’t help. .... 2  
Presentation was simply too long or too short and nothing would have helped .... 1

Adapted from: Science Education Resource Center at Carleton College. (2007). *Assessment by oral presentation*. Retrieved September 3, 2008, from <http://serc.carleton.edu/NAGTWorkshops/assess/oralpresentations.html>.

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