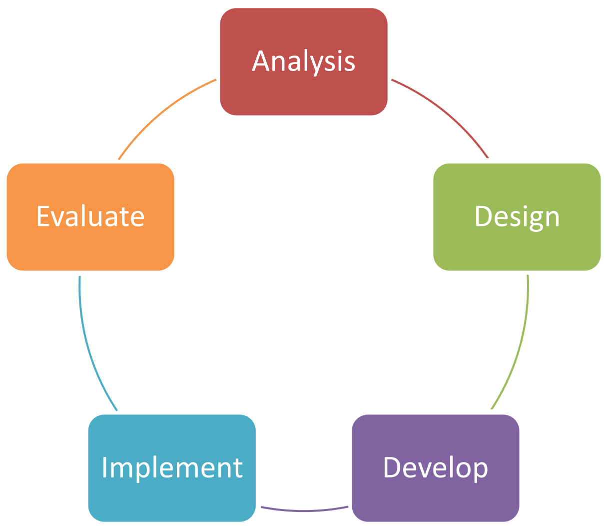
TRAINING AND RESOURCES TOOLKIT

Welcome to the training and resource toolkit. The Training Overview recommended a five step process to develop training and resources. In addition to following the process, this toolkit provides templates and examples to aid you during the ADDIE process.

ADDIE Model: The ADDIE model is a commonly used methodology for developing and implementing training. There are five steps you can follow to understand the: who, what, where, when, why and how to training.



Where to go for help

If you need assistance with this guide or assistance with developing training please contact **HRM Training & Development** at http://www.northeastern.edu/hrm/training/index.html

Additional Resources include:

Information Technology Services: http://www.northeastern.edu/its/

Academic Technology Services: http://www.ats.neu.edu/

ANALYZE

Do I need training or a resource or both?

Use the following decision criteria to determine if you really need to build and deliver training or if an informational resource, such as a job aid, will do.

1. Issues:
   - Is there a problem you want to solve?
   - What do you want your learners to be able to accomplish after they complete training?
   - Is the outcome measurable? Can you qualify or quantify the results?
   - Do you need to communicate a change?
2. Learners:
   - Who needs the training?
   - Will everyone have access to the training and/or resource?
3. Time/Resources:
   - What is the timeframe for delivery?
   - Do you have resources available to create, produce and execute training? (time, people, approval, money)
   - Do you or your team have the expertise to develop and deliver training or resources, or do you need to hire someone externally?
   - Who are your stakeholders? (i.e., Does everyone agree on the need for training? The approach? Executive buy-in/sponsorship?)
   - Are there any obstacles that will keep you from implementing training?

Decide at this point if you need a resource, training or both. Then follow the rest of the ADDIE steps to develop your resource or training.

A **Resource** is needed when you want the learner to understand the issue or perform a function, but with the assistance of materials to guide them independently.

Situations include: minor process changes, reinforcement in current job (skills and/or technology).

This can include job aids such as checklists, reference guide, or online FAQs.

Training is needed when additional explanation and practice will help the learner understand the issue and/or perform a function independently in the future. The training should fill a performance or knowledge gap for the learner.

Situations include: learning a new skill, major process changes, when there needs to be a high level of participant involvement, procedural changes.

Examples include: in person, online modules/videos, one-on-one tutorial, e-learning

ANALYZE

Who develops, who delivers?

Sometimes the cost and time to develop materials in house is not as efficient and effective as hiring someone else. Below are some criteria to help you decide if you can develop the materials and training in house or you need to look outside the organization. Mostly yes? Look into hiring an outside vendor or consultant to assist.

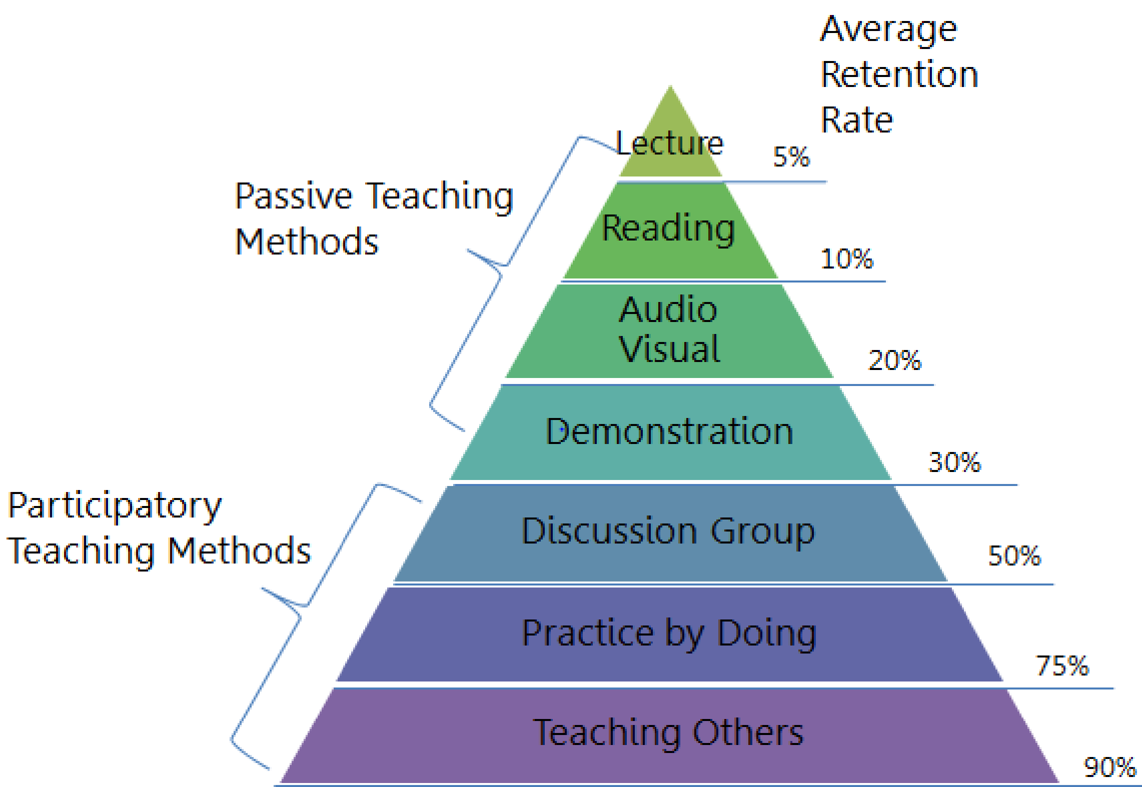
Criteria	Yes	No
1. Shortage of instructors	☐	☐
2. Shortage of design time	☐	☐
3. Shortage of training time	☐	☐
4. Non-recurring problem/situation	☐	☐
5. Positive cost-benefit	☐	☐
6. Standardization required	☐	☐
7. Shortage of training facilities	☐	☐
8. Lack of subject expertise	☐	☐
9. Desire for outside viewpoint	☐	☐
10. Subject not industry specific	☐	☐
11. Meets established need	☐	☐
12. Fits with existing curriculum	☐	☐

**Adapted from Langevin "The Successful Training Manager" 2009*

DESIGN

How do I get my learners to pay attention?

Keep in mind that different training methods are more effective than others. Below is a commonly used guide for adult retention rates from the National Training Laboratories Institute. As you can see, the less you speak at participants and the more hands on you make the training, the more likely your participants will retain the information.



**Adapted from the National Training Laboratories Institute*

DESIGN

How can I make my training look great so people will use it?

Now that you've thought about what the need is and how people learn best, it's time to complete a course design document. This template helps you to outline the following:

- your objectives
- the order of the content you want to deliver
- the level of interactivity, and
- how you will ensure that the learner learns what they need to know

Here are two sample design templates adapted from Rapid Instructional Design by Piskurich.

Simple Design Template

1) Why do we need this?
2) Who will use it?
3) What will the content be?
4) How much/ how long? When?
5) Who will create, implement and maintain it?
6) When will it be ready?

Project-based Design

Scope of Project: **(what's the focus or purpose?)**		
Goal:	Audience:	Timeline/ Milestones:
Design		
Who knows the content?	How should it be delivered?	Problems/ Opportunities:
Development		
Objectives:	Outline of topics:	Criteria for Success:
Delivery:		
Materials:	Resources/ Constraints:	Testing:
Logistics, Administration & Evaluation		
Communicate:	Track:	Measure Success:
Other Resources:	Links:	Updates:

DEVELOPMENT

How do I make sure to include everything I need to in my training?

When you are ready to develop your content, it's important to remember who your audience is and what you want them to be able to accomplish after they attend training. Here are a few tips to get you started:

Basic Plan for Development

Training usually has three parts: Tell & Show, Do, Review. So for each part where you present materials or demonstrate a skill, you'll want to follow up with an activity where the learner applies the knowledge they were taught. Then you will review to determine if they have successfully learned and retained the material. It's a good idea to mix up the different parts to keep things interesting and engaging for the learners.

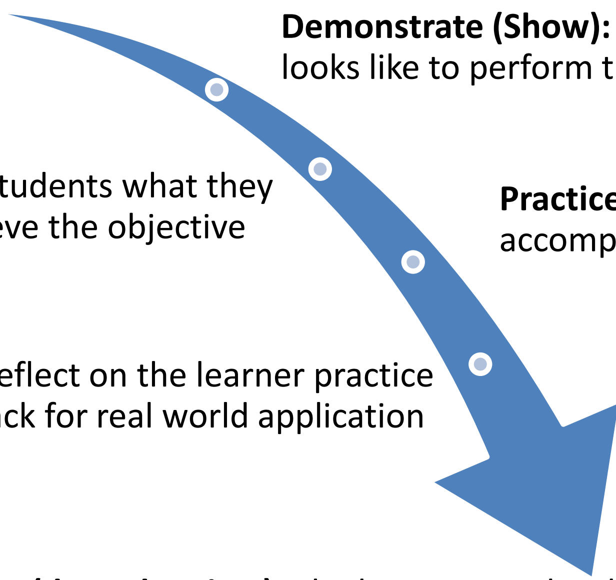
Examples include:

Tell & Show: lectures, demonstrations and discussion (brainstorming, big group, small group, one-on-one)

Do: practice, games, role play, case studies

Review: quizzes, debriefing, on the job performance

Objective/Relevance (tell): Explain the purpose of the training and reminder learners about how training fits in with their role, responsibility, etc.



Demonstrate (Show): Show the learners what it looks like to perform the objective

Instruct (tell): Teach students what they need to know to achieve the objective

Practice (Do): Have the learners try to accomplish the objective

Feedback (review): Reflect on the learner practice and give them feedback for real world application

Mastery (do and review): The learners apply what they learned in real world situations and you, mgrs or others can review for understanding and provide more feedback

**adapted from Robert Mager: Module Floor Plan*

DEVELOPMENT

How do I make sure my training hits the mark?*

Because people have different kinds of intelligence, they learn in different ways, and teachers are most effective when they engage all of their students' learning styles. To capture participants' interests and to touch upon the different ways they learn, we recommend the following strategies for adult learners:

Be clear in your objective. In 15 words or less. For example: In this training session, you will learn the new process for handling I-9 forms.

Icebreaker/Activate background knowledge. An icebreaker is a good way for participants to learn more about each other. It's also a good opportunity for them to talk about their experience with the topic at hand. For example, if you are training participants on a skill, ask them why they are interested in learning the skill or their prior use of the skill.

Use variety. For example: Follow a brief lecture with an activity and then debrief with a small-group discussion.

Change the pace of the class as needed. For example: Move from a short lecture to a longer small-group session.

Touch upon all learning styles. For example: When using PowerPoint, use a mix of text and visuals (pictures, graphs, etc.) and even sounds to appeal to all types of learners.

Encourage learner participation. For example: Ask open ended questions. They usually start with "What or How": Instead of "Do you use time management techniques in your job?" ask, "What kinds of time management techniques do you currently use and how?" Also use feedback and encourage participants to share and learn from each other.

Review, review, review. For example: Ask questions, check for understanding, and have participants explain what they have learned in their own words.

When working with adults, keep in mind that they:

- Are self-directed
- Are practical and problem solving
- Need to know why something is being learned (WIIFM – What's in it for me?)
- Need adult-appropriate content
- Have previous experience as a resource
- Need to demonstrate background knowledge and abilities
- Need to be able to apply learning immediately to real-life situations

**How to make sure your training hits the mark was adapted from Tools for Trainers: Adult Learning Center for Applied Linguistics. (2006). Cultural orientation for refugees: A handbook for U.S. trainers. Washington, DC: Author. And the Cultural Orientation Resource Center, Center for Applied Linguistics. (2010). COR Center Web site: http://www.cal.org/co*

DEVELOPMENT

Who is doing what during the actual delivery of training?

Timed Agenda

If you are delivering training, it helps to create a timed agenda for your outline. If you have more than one presenter, outline who is responsible for each topic/activity:

COURSE/CLASS TITLE			
Topic Area	**Duration**	**Actual Time**	**Presenter**
1. Introductions & Recap • Intro • Agenda • Participant Intros	**15 min**	9:00-9:15	Susie & Rob
2. Activity • Reviewing Answers (5) • Definition	**15 min**	9:15-9:30	Susie
3. Video 1 • Activity & then Large Group Discussion	**15 min**	9:30-9:45	Rob debriefs & Susie writes on flip charts
4. Active Listening Overview • Elements/ Components / Benefits	**15 min**	9:45-10:00	Elements: Susie Components: Rob Benefit: Susie
5. Video 2 • Activity/ & then Large Group Discussion	**10 min**	10:00-10:10	Susie debriefs & Rob writes on flip charts
6. Practice • Practice session	**15 min**	10:10-10:25	Rob
7. Quick Summary • Review key points • Toolkit	**5 min**	10:25-10:30	Susie, then Rob
8. Q&A Session • Take questions	**10 min**	10:30–10:40	Susie & Rob
Total Time:	**90-100 min**		

DEVELOPMENT

Do I have everything I need to deliver training?

Once your content is ready and you've thought about the delivery, review a checklist to help with the logistics and communications. Here's a sample checklist that you can adapt for your needs:

Training Logistics Checklist

Event Name:					
Date:		*Set-up time:*		*Training time:*	
Location:	[name, address and directions]				
Location contact(s):	[If you do not manage the location: name, role, phone & email]				
Set Up:	[round tables, demonstration, labs, workshop, etc.]			*# of participants:*	
Set-up Instructions:	[layout of chairs and tables, podium and stage, A/V, displays, catering, etc.]				

Items	***Notes** (e.g. quantity, type, instructions)*	***Responsibility** (I.e. your team, ITS, Consultant)*
Registration	Decide if participants are going to register ahead of time or the day of the event. It's a good idea to keep track of who attends your training in case you need to refer back to it later.	
Advance Registration	You can use simple tools like email and excel to keep track of advance registrations. You can also use web-based registration tools such as attend.com, gosignmeup.com, constant contact or wufoo.	
Day of Registration/Sign in		
Table & chairs		
"Please sign in" sign		
Name tags/Name tents		
Sign-in sheets or laptops if web-based		
Agenda, materials, pens, etc.		
Facility Requirements		
Tables & Chairs(registration, guests, food)		
Seating diagram		
Location for lectern, screen, and the projection table		

Power supply/outlets/extension cords if using laptops		
Confirm Internet access		
Presentation		
Podium at front		
Projector & screen		
Laptop computers		
Presentation clicker		
PA System mic/speakers)		
PowerPoint file	Always bring a copy of your presentation on a USB drive. If you save it on a network drive, you may not be able to easily access it the day of.	
Paper copies if necessary		
Tech Support	You can easily request tech support from ITS before your event. Log onto myNEU.neu.edu>Services & Links>Faculty/Staff Services>AV requests	
Facilitator Materials		
Facilitation plan, instructions and timed agenda		
Misc. items: pens, markers, tape, scissors, post its	You never know when these items might come in handy during training!	
Flips charts/easels	You may want to use some prepared flip charts for the session so bring those as well.	
Refreshments		
Food/Beverages/Snacks		
Special dietary needs		
Recycling, Green & Waste Bins		
Other Considerations		
Special accommodations	Contact the Disability Resource Center for more information on accommodations on campus (http://www.northeastern.edu/drc/)	
Post evaluation	Develop and print surveys to be handed out in the room or send a web-based survey after the session.	

IMPLEMENTATION

How will my learners know about my training?

Implementation varies depending on whether your solution is a resource or website, a self-paced video or online instruction, or even a training or presentation you offer on a regular basis. Here are some worksheets and tips to help you get started with this most important and visible phase of your project.

Communication examples

Before implementing training or distributing resources, you need to make sure to communicate your plan to the appropriate stakeholders. For example, if there are new compliance regulations coming out and it's your responsibility to train your department, below is a communications plan that outlines who you need to communicate to, what, how, and when.

Communications Plan for: *New Compliance Training*			
Overall Communication Objective: *Notify management of the mandatory training and explain the changes, details and logistics to attendees.*			
Audience	**Communication Objectives**	**Channel**	**Timing**
Executives/Management	*Explain the new compliance regulations and the need for training. Ask for support by giving employees time to attend.*	*Email, Memo, Meeting etc.*	*45 days before training session*
Participants	*Explain the new compliance regulations and upcoming training*	*Email #1*	*30 days before training session*
Participants	*Send pre-registration notification/calendar invitation with details and logistics*	*Email #2*	*21 days before training session*
Participants	*Reminder email*	*Email #3*	*1-3 days before training session*
Participants	*Follow up email with evaluation*	*Email #4*	*1 day after training session*

** Adapted from www.mindtools.com/rs/CommsPlans.*

Here is an example email communication to participants of a training session on learning Excel

> Dear Laurie,
>
> You know how to create a basic spreadsheet in Excel with simple formulas, but now you are ready to do more. Please join us on **Monday, October 27th,** for **Excel: Beyond Basic Formulas** to learn about Date Functions, If Statements, VLookup, and Absolute Cell references in formulas. If you've heard of these things, and wanted to learn more, then this may be the class for you.
>
> For more detailed information and to register, click on the link below.
>
> Please **register by Thursday, October 23rd**. If the class is full, and registration is closed, you may be added to the waitlist by emailing *yourdepttraining@neu.edu.*

IMPLEMENTATION

What am I forgetting before I implement training?

Training Implementation Worksheet

Course Name:

Determine Delivery Constraints			
1. Deadline for completion of delivery:		Number of times to be delivered:	
2. Number of employees to be trained:		Maximum class size:	
3. Venue/location for training:			
Is the venue the same for all offerings of this course? ☐ Yes ☐ No			

Set Training Schedule	✓
4. Create delivery calendar (reflecting all the constraints listed above).	☐
5. Confirm delivery calendar with the training sponsor.	☐
6. Assess instructor competencies to determine which are best qualified to deliver the course.	☐
7. Assign instructors for each course and add their names to the schedule.	☐
8. Book training rooms for each planned delivery of the course.	☐
9. Other:	☐
Confirm Logistics (See Logistics checklist for more details)	✓
10. Materials have been sent to participants or printed prior to the start of training.	☐
11. All equipment requirements have been taken care of.	☐
12. Training facilities are set up as requested.	☐
13. Other:	☐
Communicate with Managers/Supervisors (See the Communication Plan template for more details)	✓
14. Ensure that managers/supervisors have been informed of procedures for registering learners.	☐
15. Ensure that they have briefed learners about the purpose of the training and expectations.	☐
16. Ensure that they have made arrangements to cover employee absences during training.	☐
17. Other:	☐

Communicate with Learners (See the Communication Plan template for more details)	✓
18. Send a pre-course letter to the learners. The letter should include all pertinent details about the following elements: • Course information (i.e. course objectives, course hours, pre-course preparation, name of the instructor, etc.) • Location information (i.e. name, address, and telephone number of location, parking instructions, map to location, etc.) • Meal information (i.e. if meals are provided, time allotted for coffee breaks, requests for special dietary needs, etc.) • Recreational information (i.e. facilities available, sites and shopping, etc.)	☐
Confirm Post-Training Activities (as applicable)	✓
19. Conduct a follow up survey with learners.	☐
20. Suggest managers/supervisors follow up with learners to discuss post-training expectations.	☐
21. Follow-up with managers/supervisors to ensure learners complete post-course practice/tasks.	☐
22. Provide access to an online community or discussion group to reinforce the training.	☐
23. Compile and analyze all evaluation data.	☐
24. Other:	☐
Notes	

**adapted from Langevin "Advanced Instructional Design", 2009*

EVALUATE

What did they learn from my training?

It's always a good idea to get feedback from the learners for two reasons: 1.You can determine what they've learned. 2. To make improvements for next time. Use surveys to ask learners about the content, the delivery mode, the instructor, timing, etc.

Short form evaluation example

Question	**Strongly Agree**	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**
1. The training session was a worthwhile use of my time:	❍	❍	❍	❍	❍
2. What did you find most interesting, useful or positive in the session?	❍	❍	❍	❍	❍
3. I would recommend the module to others.	❍	❍	❍	❍	❍
4. What could be done differently or better?	*Open comments*				
5. Other Comments/Suggestions?	*Open comments*				

Long form evaluation example

Question	**Strongly Agree**	**Agree**	**Neutral**	**Disagree**	**Strongly Disagree**
1. The training met my expectations.	❍	❍	❍	❍	❍
2. I will be able to apply the knowledge learned.	❍	❍	❍	❍	❍
3. The content was organized and easy to follow.	❍	❍	❍	❍	❍
4. The materials distributed were pertinent and useful.	❍	❍	❍	❍	❍
5. The trainer was knowledgeable.	❍	❍	❍	❍	❍
6. The quality of instruction was good.	❍	❍	❍	❍	❍
7. The training met the stated objectives.	❍	❍	❍	❍	❍
8. Participation and interaction were encouraged.	❍	❍	❍	❍	❍
9. Adequate time was provided for questions and discussion.	❍	❍	❍	❍	❍
10. I would recommend this training to others.	❍	❍	❍	❍	❍
	A Lot	***Some***	***Nothing***		
11. How much did you know about this subject **before** taking this workshop?	❍	❍	❍		
12. How much do you know about this subject **after** participating in this workshop?	❍	❍	❍		
13. What aspects of the training could be improved?	*Open comments*				
14. Other Comments/Suggestions?	*Open comments*				
15. What additional training (if any) would helpful?	*Open comments*				