



Department of Child Support Services



DCSS
Training for Trainers
Certification Program

Instructional Design Strategies

County of San Diego
Department of Child Support Services

Dr. Thomas L. Boardman, Jr.
Director

Christian Ching
Training Manager, SDS
Staff Development Division

Department of Child Support Services

**DCSS Training for Trainers Certification Program
Instructional Design Strategies**

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County of San Diego
Department of Child Support Services
225 Broadway, 12th Floor
San Diego, CA 92101

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Instructional Design Overview

Objectives

- Justify the need for instructional design strategies.
- Apply the basic principles of trading off resources between design and delivery and among the three components of effective instruction to accelerate the instructional design process.
- Apply appropriate shortcuts, combinations, additions, and deletions to the San Diego County model to improve the instructional design process.
- Use templates to accelerate the instructional design process.
- Use appropriate equipment to sustain the instructional design process.
- Make more effective use of human resources (including subject matter experts [SMEs] and management) to support the instructional design process.
- Reduce stress and low morale by positively associating cost and time instructional design with better learning effects.

Effectiveness & Efficiency

To help identify specific instructional design components, two basic trade-offs are necessary to prevent sacrificing the effectiveness of the DCSS Training for Trainers Certification Program for the efficiency of the process.

The first is between the design and the delivery of the instruction. Design involves all activities undertaken before the actual trainer interacts with the instructional package in a live training situation. Delivery is what happens subsequently. An important principle (and constraint) is that you can trade off resources allocated to these two phases.

For example, if you have a high resource level for delivery (SMEs as Program Training Trainers, plenty of instructional time, small groups of participant trainers, and alternative instructional materials), you may minimize the design. On the other hand, if you have extremely limited resources for the delivery of instruction (no specialist Program Training Trainers, tight learning schedule, and large groups of participant trainers), you need to allocate extra time and other resources to the design process. Depending on the context, you can (and should) select the optimum allocation of resources between design and delivery. It would be inefficient to produce easy-to-use instructional packages for all situations without carefully taking into consideration the resources available for the delivery of instruction. The DCSS Training for Trainers Certification Program instructional design requires that you exploit everything available in the instructional scene.

The second trade-off is among the three components of an effective DCSS Training for Trainers Certification Program instructional package. For effective instruction, these three components must be considered:

1. Presentation to participant trainers of new information related to the instructional objectives.
2. Activities by participant trainers that require them to process the information and to provide a response.
3. Feedback to participant trainers to provide reinforcement for desirable responses and remediation for undesirable ones.

Whether these three components are applied at a micro level (as in the case of step-by-step directions on how to design a training course) or at a macro level (as in the case of a global case study on methods used to develop a training course), they are essential to this instructional package.

You should not ignore any of these three components. You can adopt or design these three components independently of each other, in the initial stages. For example, you can discuss the subtleties of a task concept with a SME. You can then design appropriate practice activities to facilitate the mastery of the concepts and to provide suitable feedback in the form of a model response.

The following strategies discussed are not mutually exclusive entities. You can use different combinations to save time and money in the DCSS Training for Trainers Certification Program instructional design project. You may consider skipping an instructional design activity, combine two others, take a few shortcuts in another, computerize your production, and deliver your final package within an individualized instructional framework. Exactly which strategies you select and how you combine them will depend on the resources and constraints in your instructional design situation.

If and when you discuss these strategies with your professional colleagues, you may be accused of compromising basic principles, returning to the prehistoric period, and reducing instructional integrity. Remember that the final criterion for evaluating instruction is how well the participants learn. My experiences (which are confirmed by the experiences of my students) actually suggest that quick-and-dirty instructional packages often result in higher-quality instruction. Paradoxical though this may sound, a little reflection reveals the logic. When you do not have time to make a big production out of instructional design, you are forced to focus on the basics. You and your team are not tempted into bells, whistles, and other embellishment. The resulting instructional package is lean and powerful.

Chris Ching
Training Manager, Staff Development
Support Division

DCSS Training for Trainers Certification Program Instructional Design Strategies

Strategy 1. Accelerate the Process

Guideline 1

Use shortcuts in various phases of the instructional design process. As long as you treat your DCSS Training for Trainers Certification Program training structure as a flexible framework (and not as compulsory commandments), you can use it to prevent waste of time. The important point to remember is to modify the model to suit your needs.

You can save significant time and resources by employing shortcuts to the procedure. Every phase and step of the instructional design process can benefit from several of these shortcuts.

Needs analysis. To confirm or reject an apparent need, use existing records instead of extensive interviews.

Task analysis. To identify various steps of an administrative procedure, check with your child support program policy and procedures manual and/or standard operating procedures manual. Ask employees to describe exceptions and modifications of these procedures.

Production. Ask a SME to demonstrate an activity and document the action(s).

Expert reviews. Instead of sending out review copies to various experts and waiting for them to give you feedback, conduct a focus group session. Give copies of the material to a selected group, and walk them through a structured discussion. Among other things, this approach saves time by requiring experts to reconcile differences of opinions and provide you with specific prescriptions.

Evaluation and revision. Test the instructional package individually with four or five representative trainers, making on-the-spot revisions during the tryout session. The improvements resulting from this procedure are comparable to those from elaborate evaluation with stratified random samples of several participant trainers, control groups, pretests and posttests, and sophisticated statistical analyses.

Guideline 2

Combine different phases of the instructional design activities. Most Program Training Trainers realize that the phases and steps in the instructional design process are merely for convenience and not absolute divisions. For example, you cannot declare that all your analyses are completed at a specific time and that you will not do any more analysis later. You can deliberately combine adjacent steps in the instructional design process to save time.

Analysis and design. Instead of completing a comprehensive analysis of an entire course, you can begin writing the course materials, undertaking analyses as needed. The act of writing the material will help you come up with the right questions for your analysis.

Analysis and evaluation. Most valid evaluation strategies accurately reflect the results of various analyses. For example, final tests should be based on the task analysis and the final impact of training should be evaluated against the needs analysis. You can save instructional design time by reporting the results of different analyses in the form of evaluation blueprints.

Evaluation and design. A standard operating procedure in instructional design is to specify behavioral objectives and use them as the basis for constructing criterion tests and designing instructional content. You can bypass the step of writing instructional objectives, and use criterion test items to provide the operational definitions of the objectives.

Evaluation and implementation. In most situations, this prototype DCSS Training for Trainers Certification Program instructional package is an improvement on earlier instructional attempts. There is generally no need to conduct a contrived pilot test before actually using the package for training purposes. Unless you have serious reservations about your instructional design competencies, combine your field test with the first run of the training program. In addition to saving time, the data from this approach will be more realistic and useful.

Strategy 2. Use a Partial Process

Consider completing all of the training phases and steps when you are designing a comprehensive DCSS training curriculum for child support staff. You don't have to blindly follow all the steps for creating a simple checklist. (See example, "Appendix A: DCSS Training for Trainers Certification Program Training Checklist" on page 25.)

Guideline 3

Skip phases in the instructional design process that are unnecessary or superfluous. Most instructional designers are indoctrinated to feel guilty if they skip any phase or step in the conventional Five-D (Diagnose, Design, Develop, Deliver, and Determine) process. This results in unnecessary waste of time and other resources. You can improve the efficiency of the DCSS Training for Trainers Certification Program instructional design by recognizing and avoiding unnecessary activities.

Needs analysis. Avoid challenging the statement and insisting on conducting your own front-end analysis, needs analysis, performance analysis, and so on. Don't waste time and money.

Summative Evaluation. Instructional designers frequently attempt to conduct a final field test under controlled conditions to validate the cost-effectiveness of the instructional package. While this is an important and worthwhile undertaking, ask yourself, Who Cares? And So What? There is no special advantage in collecting data and writing reports if nobody reads them and no useful improvements result.

Meetings and Report Writing. An enormous amount of time and money is spent in having people attend meetings and write reports before, during, and after instructional design. Significant savings can be achieved by eliminating all unnecessary meetings, having meetings attended by only the essential decision makers, increasing the productivity of meetings with specific agenda and time limits, replacing information-dissemination meetings with e-mail and voice-mail messages, eliminating all unnecessary reports, and minimizing the essential reports.

Guideline 4

Produce a lean version of the instructional package for immediate use and continuously improve it after implementation.

By focusing on critical content and key steps, and by producing a lean instructional package, the following goals can best be met:

- Satisfy the Program Training Trainer's obsession for doing it right the first time through painstaking analysis and planning
- Please all of the people all of the time through incorporating everyone's inputs and feedback
- Attempt perfection through several rounds of testing, revision, and retesting
- Save time and other resources

Improvements to this core package can be added gradually after it is implemented. Here are some specific suggestions:

- Classify content areas in terms of importance. Separate the nice-to-know elements from the absolutely essential ones. Ignore (or list) the former and spend your time and resources in designing detailed instruction for the latter.
- Identify target subgroups and focus on the majority. Design your package for use by the subgroup to which most of your participant trainers belong. You can temporarily ignore the advantaged minority and make some special provisions (such as remedial tutoring) for the disadvantaged minority.
- Stop your initial instructional design at the end of the minimal activities. During the initial stage, just conduct a task analysis and construct a criterion test. Organize the test items in an appropriate sequence and use the collection as the initial instructional package. Use a SME to provide the necessary information and/or support instruction on the job. Later, gradually include the SME and/or Trainers with suitable instructional content activities for cross-training purposes.

Strategy 3. Incorporate Existing Instructional Materials

Use suitable materials to reward learning.

Guideline 5

Use a systematic approach to analyze participant trainer and delivery variables to adapt the content and activities in existing DCSS Training for Trainers Certification Program instructional material.

Even if an off-the-shelf instructional package does not exactly meet your requirements, it is usually cheaper and faster to modify the material than to design a new package from scratch. Even in cases when there are absolutely no available training materials, it is possible to adapt instructional packages that deal with some related product or procedure. The “not-invented-here” reaction to existing instructional materials is expensive and time consuming.

Here are some suggestions for incorporating existing instructional material into a new package:

- Begin with a quick analysis of the new problem, task, content, participant, language, and delivery variables.
- Check the existing instructional materials against the results of these analyses.
- Modify the intents (goals and objectives), contents, and activities. Specific modifications may include deleting portions dealing with unnecessary objectives, adding new objectives and content, simplifying the language, and modifying the activities.

For an alternative approach based on formative evaluation, take the existing instructional material in its current form and try it out with a representative group of participants. Based on the feedback, make appropriate modifications to the materials to better meet the needs and preferences of the participants.

Guideline 6

Deliberately design generic instructional materials for local finish. Use this technique in your organization with standard policies and procedures that are adapted to local conditions, cultures, and resources.

The success of this approach depends on using flexible design principles to create the original package. Here are some suggestions for this approach:

- Modularize the instructional package by objectives (rather than by content) to permit Program Training Trainers to delete modules or to rearrange them based on their specific goals.
- Use printed materials. Printed materials are easier to modify than multimedia productions. Within print, pages formatted with word processing software (e.g., Frame Maker) are easier to modify than those that are typeset in the traditional fashion. Simple illustrations are easier to modify than complicated artwork.

- Whenever possible, build the training package around a set of job aids. By modifying the job aids to suit the local needs and constraints you can rapidly modify the scope and sequence of the DCSS Training for Trainers Certification Program instructional package.
- Make the structure and organization of the training package clearly visible through the use of appropriate headings. Use sectional headings and page numbers. Provide detailed table of contents and indexes. These elements should permit Program Training Trainers to immediately locate the appropriate sections for modification.
- Check all your illustrations and people's names and incidents in examples and exercises to make sure they are culturally neutral (or diverse). Maintain confidentiality policies.
- Include a collection of alternative examples and cases along with the generic package. Provide keyword indexes to these examples to permit local designers to choose the most appropriate ones.
- Include a collection of alternative exercises and activities. Use suitable classification schemes to identify the key features of each alternative.

Strategy 4. Incorporate Existing Non-Instructional Materials

If you divide the DCSS Training for Trainers Certification Program instructional package into three components, content, activities, and feedback, you can integrate several interesting and instructive non-instructional materials to present the basic content.

Guideline 7

Use non-instructional materials to present the basic content. Design suitable activities and feedback systems to reinforce this content.

Here are some examples of non-instructional materials being integrated into instructional packages:

- A course on public speaking uses videotapes of several professional and amateur speakers. Participants are provided with a checklist for evaluating key elements of each speaker's performance as a prelude to videotaping one's own presentation and critiquing it.
- A new employee orientation package includes the annual report of the corporation and its policy manual. Participants spend an hour reviewing these documents and coming up with the correct answers to 20 factual questions.
- An in-house management-training package contains various excerpts from television sitcoms. The facilitator uses these as examples of different management styles. Later, teams create their own sitcom segments to illustrate a new type of manager for the next decade.

Guideline 8

Design instructional packages around job aids.

Job aids are checklists, decision tables, worksheets, flowcharts, and other such items that improve the performance of a person as he or she is performing, without the need for remembering specific steps or factual information. The telephone directory is an example of a job aid that improves your ability to call others without having to memorize random digits. Instructional packages for most procedural tasks can be designed efficiently by beginning with the design of job aids. Here is a simple two-step procedure for using this strategy:

- Use your task analysis to identify steps and decisions in the procedure. Prepare a set of job aids that will enable a participant to complete the procedure. Coach the participant through these job aids to collect feedback. Modify the job aids to make them more effective and user-friendly.
- Analyze the job aids to identify basic skills for using them. Prepare an instructional package to teach participants how to use the job aids. Test your package on representative trainers and modify it on the basis of their feedback.

Frequently, the necessary job aids may already be available (e.g., in Training for Trainers documentation or vendor manuals). Design an instructional package to teach Trainers how to use them.

Strategy 5. Use Templates

Use templates to specify the content, sequence, activities, and feedback requirements for different types of learning. You can use job aids to simplify the task of instructional design. Templates provide a convenient type of job aids.

Guideline 9

Instructional objectives can be classified into specific types of learning and, although there is no one best strategy for each type of learning, there are a few preferred strategies based on practical principles of learning. Templates can also be used for non-computer based instruction. Worksheets, decision tables, and checklists can accelerate the instructional design process at the strategic and tactical levels. Here are some examples:

- Use some convenient scheme to classify instructional objectives into such types as factual information, concepts, processes, procedures, and principles. For each type of information, use a standard format for creating criterion test items.
- For teaching factual information, use this template: Present the information in suitable chunks, emphasize logical links, provide mnemonics (“hooks”) to facilitate recall, require participants to process the information, provide suitable feedback, review the information, repeat the information in different configurations, and summarize the information.
- For teaching concepts, use this template: Present clear-cut examples, present matched non-examples to emphasize critical features of the concept, present divergent examples to emphasize variable features, require the participants to discriminate among new examples and non-examples, provide feedback, and test for the ability to generalize and to discriminate.
- For teaching procedures, use this template: Provide an overview of the entire procedure, demonstrate each step and identify its critical elements, coach the participants as they practice each step, require the participants to demonstrate their mastery of each step, integrate all steps, and provide systematic practice toward fluent application.

Guideline 10

Use standard procedures for designing small-group instructional activities.

Program Training Trainers frequently have difficulties designing experiential activities that involve interaction among participants. To simplify and accelerate the design of an activities-based instructional package, you can use several pre-established shells, which are associated with different types of learning. Use templates to specify the content, sequence, activities, and feedback requirements for different types of learning.

Strategy 6. Use Computers and Technical Devices Equipment

The DCSS Training for Trainers Certification Program instructional design involves the production, revision, and reproduction of various materials. Like any other production activity it can be speeded up considerably by the use of high-tech equipment.

If you are not using computers to produce your instructional packages, you are at a competitive disadvantage. Investment in even the simplest software can significantly accelerate your production. Here are some examples of how computer software can be used in different stages of instructional design to support the DCSS Training for Trainers Certification Program:

Guideline 11

Use suitable computer software packages to accelerate various aspects of analysis, design, writing, illustration, evaluation, and revision.

Analysis

- **Form design packages** (e.g., JetForms) for quickly designing questionnaires and forms for data collection.
- **Flowcharting software** (e.g., Microsoft Visio) for rapidly preparing flowcharts during and after task analyses.
- **Spreadsheets** (e.g., Microsoft Excel or Lotus 1-2-3) for analyzing, summarizing, and charting quantitative data.

Design

- **Creativity tools** (e.g., Idea Fisher or Idea Generator) for designing the instructional package.
- **Specially designed expert systems** (e.g., those found in proprietary CBT authoring systems) to ensure the use of appropriate instructional strategies and tactics.
- **Outliners** (as found in Microsoft Word) and **idea processors** (e.g., MaxThink) for systematically building up from analysis data through criterion test items to instructional content.
- **Word processors** (e.g., Microsoft Word or WordPerfect) for producing initial drafts, revisions, and for archiving earlier versions.
- **Spell checkers and proofreading packages** (e.g., Grammatik or Right Writer) for cleaning up the draft version and for maintaining an appropriate reading level.
- **Desktop publishing software** (e.g., FrameMaker) for rapidly laying out finished pages.
- **Graphic packages** (e.g., Corel Draw) for producing charts and illustrations.

- **Presentation packages** (e.g., PowerPoint) for rapidly producing slides and transparencies.

Evaluation and revision

- **Use specially designed computer software** for the initial presentation of the instructional text and automatic trapping of student responses.
- **Word processors, desktop publishing packages, and graphics software** for rapidly revising and re-sequencing text and illustrations.

Guideline 12

If available, use audio and videotape recording equipment to save time on analysis and production.

In recent years, camcorders, micro cassette recorders, and other electronic recording devices have become cheaper, smaller, lighter, friendlier, and more powerful. They provide another set of tools for automating and speeding different aspects of the instructional design process. Here are some examples:

- During task analysis, you can videotape a Program Training Trainer's delivery of a complex training technique. By replaying, pausing, slowing down, and freezing this videotape, you can complete a thorough task analysis without wasting the expert's time.
- You can have an expert videotape his or her demonstration and mail the tape to you. This saves travel time and money.
- During design, you can record an interview with a SME and edit the tape for presenting the basic instructional content.
- During design, you can record a lecture on video or audiotape and use it as the quick-and-dirty prototype.
- During evaluation, you can videotape a focus group session and conduct a leisurely review later to analyze and summarize the feedback.

Strategy 7. Involve More People

SMEs, supervisors, and support personnel could assist in accelerating the instructional design work. However, The usual reaction to urgent demands is to immediately hire more people. This is a fairly expensive approach and is not always guaranteed to produce results. Decide what resources are appropriate for the success of the training (keep in mind the learning curve for new staff vs. existing staff).

Guideline 13

Use an emergency team to rapidly work through all phases of systematic instructional design.

Experiment with a SWAT (Specialized Workers And Tactics) Team approach to instructional design during emergencies. In this approach, a specially assembled team is given a specific training objective and all the necessary equipment and support staff. Here's a brief description of how a marathon instructional design session works:

- The Program Training Trainers are given a specific instructional objective, a time limit, and a brief description of the target population.
- The Program Training Trainer who is assisted by another Trainer or SME teaches a small group of representative participants. This instructional session is observed by a group of Trainers and support staff members.
- As the session progresses, the group of Trainers and support staff members conduct a task analysis by paralleling the Program Training Trainers' performance. They also coordinate the preparation of suitable job aids, handouts, and visuals based on the Program Training Trainers' performance.
- Immediately after the session, evaluators debrief the participants while Program Training Trainers interview the SMEs.
- Within moments of the first session, a new version of the lesson is presented to a second group of representative participants. This time, the Program Training Trainer is in charge of the session and he or she uses the handouts, job aids, and visuals. An SME assists the Program Training Trainer whenever content expertise is required. Another Trainer makes on-the-spot modifications on the materials and these are incorporated in the master set for the other team members.
- The next session is to be conducted by another Trainer (who has observed the earlier sessions) when the appropriate improvements to the instructional package are complete. The team provides coaching advice whenever appropriate. While this session is going on, the team could update the Program Training Trainer's course outline and training manual.
- The training team repeats testing and revision activities a few more times. Shortly after the last session, the instructional package (including the training manual) is ready for duplication.

Guideline 14

Coordinate training tasks and support your Program Training Trainers. Use vertical teams to specialize on different phases of instructional design or horizontal teams to specialize on different modules of the instructional package.

In general, you can use either of these two approaches for organizing your team of Program Training Trainers:

Vertical structure. In this approach, you ask your team members to specialize in different phases of the instructional design process. For example, you can use one person to specialize in analysis, another in design, another in evaluation, and so on. The main advantages of this approach include the efficiency of a person being able to concentrate on just one task and each specialist not being constrained by future tasks. The disadvantages include loss of useful information from one phase to the next and the earlier specialists running out of things to do during later stages. To achieve the maximum benefit from this approach, the outputs each person passes to the next person in the process line should meet pre-specified criteria.

Horizontal structure. In this approach, you divide the instructional package into several self-contained modules and assign the production responsibility for each to a different team/individual. Each team/individual works on its module from the initial analysis to the final testing. The advantages of this approach include the teams accomplishing a complete task and no useful information being lost from one phase to the next. The disadvantages include lack of objectivity in evaluating and revising your own package, and possible lack of consistency among modules produced by different teams. To achieve the maximum benefit from this approach, all teams should work from the same instructional design model and to same standard specifications.

Cross training is achieved by including Program Training Trainers and/or Participant Trainers from previous modules into the next. Participant Trainers become knowledgeable with the next module and are capable of teaching.

Strategy 8. Make Efficient Use of SMEs

It is a dangerous misconception that if you know what to teach (your subject matter), then you are ready to train. Equally dangerous is the opposite misconception (created and maintained by instructional designers) that SMEs cannot train. In reality, you can use SMEs to deliver training and thereby increase the efficiency of the DCSS Training for Trainers Certification Program instructional design.

Guideline 15

Train and support SMEs to become performance-oriented Program Training Trainers.

Left to their own devices, most SMEs train the way they were trained with an obsession for transmitting all the glorious technical details of everything they know. You need to shift the SME-Trainer focus from covering the curriculum to changing participants' behavior. Here are some suggestions:

- Involve the SME-Trainers in the design of the instructional package. Explain how the materials are geared toward changing the participants' behavior.
- Support the training with handouts, technical manuals, and other documents. Reassure the Trainers that the participants will have access to accurate and up-to-date information whenever needed.
- In your train-the-trainer sessions, practice what you preach (e.g., don't lecture on the importance of interactive activities).
- Use behavior modeling. Ask the SMEs to observe an expert Program Training Trainer in action. Stress how the Program Training Trainer focuses on learning rather than on lecturing.
- Involve the SME-Trainers in practice teaching role-plays. Observe these sessions and provide specific feedback to improve the training behavior.
- Provide lesson plans to structure and support the SME's training activity. Instead of including a content outline in the lesson plan, list a series of questions, which the participant should be able to answer at the end of the module.
- Include several interactive activities in the instructional materials. Train the SME-Trainers to facilitate these activities.

Guideline 16

Change the role of SME-Trainers.

One drastic approach for shifting the SME-Trainers away from lecturing and toward performance improvement is to give them a different job title. Here are a few suggestions on how to change the role of the SME-Trainer:

- Make the SMEs subject matter specialists (SMSs) instead of Trainers. Explain their task is to improve the job performance of the members of their team.
- Involve the Trainer and SMEs in designing job aids. Later, encourage the Trainer to explain the use of these job aids to the SMEs.
- Train the SMEs on the essential steps of the teaching process. Include role-plays on challenging classroom situations.
- Stress the importance of guided practice and attention to detail. Provide a detailed list of practice exercises for use by the SMEs.
- Stress the importance of giving feedback to the SMEs. Provide a job aid to the Program Training Trainers on how to give specific and timely feedback.
- Make the SMEs consultants instead of Trainers. Explain that their task is to help staff perform better on their job.
- Train the staff to use the SMEs as internal consultants. Have them organize individual and small-group consulting sessions.

Strategy 9. Involve Participants in Accelerating Instruction

The participants themselves are an important resource in instruction. You can tap this valuable resource by using appropriate strategies in instructional design and delivery.

Guideline 17

Use interactive techniques to shift instructional design responsibilities to the participants.

You can shift the practice component to participant control and responsibility during the delivery of instruction. Adjunct gaming, in which games are used to reinforce the instructional content presented through different methods and media, will help you do this. Here is an example:

The *Team Quiz* design uses SMEs to present relevant information in the form of a ten-minute interactive discussion. After each discussion, different teams spend five minutes comparing notes and prepare a set of questions. Later, teams take turns quizzing each other to win points.

Guideline 18

Use peer tutoring to maximize mutual learning and teaching.

The strategy of using participants to teach each other is highly effective. From an instructional design point of view, peer tutoring enables you to spend less time on the design by utilizing the participants as valuable resources during delivery. Here are some suggestions to maximize the instructional benefits from this approach:

To initiate the peer tutoring process, an initial set of participants must possess the basic skills and knowledge. This can be done through any suitable medium and method. An important strategy is to teach different knowledge and skill items to different participants so that everyone has to (and is able to) teach and learn from the others.

Self-directed learning teams increase the efficiency of peer learning. You can use the ingenious cooperation-competition blend in which teams coach and support each other during the collaborative learning periods.

One-on-one tutoring is significantly effective. By tutoring, testing, and certifying a few representative staff and assigning them into various teams, you can initiate an effective peer-learning format: Certified tutors teach other staff on an individual basis.

Strategy 10. Use Performance Support Systems

Learning, just like anything else you teach to others, is a performance. You can teach others how to learn and, equally importantly, you can improve others' learning through different types of performance support, including physical facilities, tools and supplies, job aids, and incentive systems. By shifting your focus from providing training to facilitating learning, you can achieve significant savings of time and money.

Guideline 19

Facilitate learning through individualized systems of instruction.

Different people learn differently and this fact prevents us from being able to design the perfect instructional package for all staff. However, by providing instructional alternatives and flexible structures, you can demonstrate your respect for diversity and save instructional design time. Here are some suggestions for setting up an individualized instructional system:

- In most instructional situations, you can provide choices among instructional materials, methods, and schedules, but not among instructional objectives. All staff is required to demonstrate the achievement of the same set of objectives.
- Conduct appropriate analysis to specify instructional objectives. Rewrite these objectives in the language of the novice participant, and include a rationale in terms of relevance to the workplace.
- Construct a criterion-referenced test based on these objectives. Prepare parallel versions of this test so that the participants can take them repeatedly.
- Collect all available instructional materials in the relevant subject area. Include textbooks, manuals, reprints, flowcharts, and desk aids.
- Review the materials and prepare a list of resources for each objective in your list. Make specific references to different materials.
- If any available material does not cover some objectives, prepare your own handouts or desk aids.
- Store copies of the materials in a convenient location, along with the necessary media equipment and computers.
- Design an administrative system for tracking and training SMEs.

Guideline 20

Use suitable incentives to reward learning.

Because of deadlines for implementing a mandated course, try to implement innovative ways to reward staff. Here is a suggestion for designing suitable instructional incentive systems:

Specify the instructional objectives and procedures for demonstrating their mastery. List several intermediate tests rather than a single final test. Match each level of mastery with appropriate incentives. Offer alternative rewards at each level (e.g., Introduction to Intermediate, Intermediate to Advanced, etc.)

Appendix A: DCSS Training for Trainers Certification Program Training Checklist

☒ **Diagnose, Design, Develop, Deliver, and Determine Program**

☒ **Overview**

This Training for Trainer checklist forms a comprehensive and easily adaptable resource package for use by Training Managers and Trainers who are responsible for planning, designing, implementing, and monitoring training programs for new and developing trainers.

☒ **Duration**

The program consists of one one-week workshop separated by twenty-five modules. A customized program to meet the specific needs of a County is derived from this one-week workshop.

Each training day is divided into two 3.5 hour sessions with a one-hour break between sessions. Varying modules are taught each day.

The training session material is applicable to a trainer training in Child Support and it covers every discipline as training skills are relatively consistent in whatever subject the trainer is training, and any necessary variations or additions may be made to the program.

☒ **Style**

Effective training is achieved through a relevant mixture of theory and practice, input of knowledge, and experimental practice. The training sessions follow this format as closely as possible. The Program Training Trainer needs to take on a variety of roles, presenter, discussion leader, facilitator of activities and role-plays, observer, and feedback facilitator. These skills are required for a new trainer to become skilled at to fulfill the Program Training Trainer role. Program Training Trainers must always be aware that they are role models.

Circumstances dictate the size of the participant group; it is recommended for this program to allow between twenty-six and thirty participants. When the participants are delivering their minipresentations, this size is large enough to act as a realistic audience. The group size is also large enough for varied opinions to exist and for open discussions, and small enough for all participants to have the opportunity to contribute. Many experimental activities require such numbers of participants plus observers and if the number is kept even, role-plays are easy to arrange and manage on a self-operating basis.

I recommend for a learning group this size two training trainers who can provide a change of face during the program, offer more than one observable role model, and share the burden of such activities as development counseling.

☒ Training Guide Format

Included in the Trainers Guide are the Trainer's outline, exercises, and supporting documentation. The stages of the modules and their approximate duration provide guidance on when to introduce training aids, run activities, and issue handouts.

Any timing given are approximate since most activities are flexible and can be varied according to the time available, the participants needs, the other resources available, and/or organizational constraints or requirements.

Each module has a consistent format. Each starts with a general description of the module, the objectives, its approximate duration, and a summary of the materials and equipment required. The remainder of the module contains:

- General advice, comments, and information about the subject.
- Specific and recommended process actions and activities in which participants are to be involved directly.
- Summarized copies of related handouts and anticipated responses to activities.

The use of handouts, PowerPoint, etc., (reproducible resources).

☒ Maintenance

Although each module is self-contained and intended to provide specific skills, in practice a training program is developed by combining a number of the modules in some form of a series. The training provides skill in the relevant subjects, however real competence is achieved only through real-life practice. I recommend arrangements be made for follow-up evaluations of the trainers after successful completion of the Training for Trainers program.

Two challenges in training and development are the retention and the transfer of the skills to the workplace. Retention may be supported with handouts, exercises, logs, course outlines, etc. A Personal Action Plan will aid with the transfer of learning to the workplace. Personal action plans are documents in which participants record what they have learned and what they intend to do with this learning following the program. This plan includes not only the "what" but also the "how," and "when" and resources require.

☒ Terminology

Since this is a series of workshops to be run by trainers for trainers, to avoid confusion between the "Program Training Trainer" and the "Participant Trainer" terms, in the Training for Trainer package the former is known as "trainer" and the latter as the "participant" unless circumstances prohibit this. The direct, personal "you" will also be used for the "trainer" whenever possible.

Each relatively discreet subject is contained in a separate module. The combination of a session or number of modules forms a workshop, and a number of these, linked by practical training experience back at work, produce the trainer development program.

Design

The design of the Training for Trainers program is intended to present the fundamentals of the subject introducing significances and extensions.

The approaches for this program is based on:

- The type of material.
- The knowledge and skill levels of the participants.
- The learning styles of the participants.

This Training for Trainers program will incite the variety, the uncertainty, the various interactions with a range of people, the satisfaction of observing the gradual development of skills, and feedback on how much the program helped.

 Validation/Evaluation

The Training for Trainers program contains a module which considers evaluation of training.

Daily validation is not necessary.

End-of-Workshop evaluation is required. A period of time is built into the programs planning.

 Stages for Success **Plan** **Training Planning Model**

- Be aware of need
- Consult with client
- Specify symptoms
- Analyze training needs
- Define objectives
- Choose training methods
- Design training
- Decide evaluation
- Produce evaluation instruments
- Discuss plan with Training Manager, Program Training Trainers, Subject Matter Experts, etc.
- Select content and methods
- Produce training scripts and/or write self-study materials
- Select or create practical activities
- Design and produce visual aids

- Make environmental preparations
- Conduct training briefing
- Run the event
- Make interim assessments
- Conduct end-of-program evaluation and personal action planning
- Run Program Training Trainer debriefing
- Review evaluated training
- Make long-term evaluations
- Establish and Maintain Communication/Interaction**
 - IV-D Director
 - Training Manager
 - CADCSS Training Department
 - CSDA Training Manager
 - County Established Training Teams (Team examples)
 - User Education Team
 - Publications Team
 - Project Resource Team
 - Training Coordination Team
 - Technical Presentation/Forms Control Team
 - Technical Support Unit
 - Logistics Team (Technical/Non-Technical)
 - Administration (Finance, Operations, etc.)
 - Subject Matter Experts
- Research**
 - Training Approach
 - Training Resources
 - Training Materials
 - Course Outlines

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- Training Equipment
 - Laptop
 - LCD
 - Overhead Projector
 - Projection Screen
 - Easels w/Paper
 - Whiteboards
 - Training Facility Checklist
 - Size and Shape of room
 - Seating arrangements
 - Handicap accessible
 - Lighting
 - Temperature controls
 - Ventilation
 - Acoustics
 - Restrooms (proximity to training room)
 - Telephones (proximity to training room)
 - Electrical outlets
 - Microphone outlets (lavaliere)
 - Elevators (proximity to training room)
 - Stairs (proximity to training room)
 - Wall space for hanging materials
 - Vending machines or snack bar (proximity to training room)
 - Parking (proximity to training facility and number of spaces)
 - Public transportation (proximity to training facility)
 - Restaurants (proximity to training facility)
 - Training Room Supplies Checklist
 - Training guide and handouts
 - Name tents

- Registration materials
- Evaluation forms
- Paper
- Pens/Pencils
- Paper Clips
- Binder Clips
- Tape
- Stapler
- Scissors
- Markers (dry erase, etc.)
- Eraser
- Flip Chart Paper
- Certificates
- Wastebaskets
- User Competency Levels
- Overall Training Process
- Review Pre- and Post- Implementation Training Effectiveness (Evaluation)
- Organize**
 - Training Materials
 - Training Schedule (Program Training Trainers)
 - Track Training Enrollments
 - Track Staff Attendance (Sign-In, etc.)
 - Site/Equipment Coordination
 - Provide Course Outlines (if applicable)
- Create**
 - Contact List(s)
 - Production, Coordination, and Distribution of Training Materials
 - Agenda
 - Goals & Objectives

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- Course Materials
 - Resource Lists
 - Equipment Maintenance
 - Office Supply Stock and Replenishment
 - Deliver**
 - Review Training Checklist
 - Classroom Set-up and Daily Maintenance
 - Equipment Check & Set-up
 - "Parking Lot"
 - Review Conditions for Success (Housekeeping)
 - Review Goals & Objectives
 - Professionalism
 - "TTT"
 - Tell your participants what you're going to tell them.
 - Tell them.
 - Then Tell them what you told them.
 - Ask questions
 - Summarize and Follow-up
 - Participant Responsibilities
 - Participate actively in the discussion and exercises.
 - Share your thoughts, ideas, and experiences.
 - Ask questions.
 - Keep to the subject matter.
 - Be an active listener.
 - Appreciate others' viewpoints.
 - Be punctual.
 - Training for Trainers Program Value**
 - Provides clearly stated performance objectives
 - Meets the specific needs of trainer participants
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- Provides practice and feedback on every skill
 - Includes practice that mirrors actual job conditions
 - Requires trainer participants to demonstrate competence in each skill
 - Provides direct impact on ROI
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