Introduction

Question: How do you create consistent, high-quality training?
Answer: Have standards, use a model and provide resources and tools.

Through the Employee Training Council, the Department of Human Services (DHS) has adopted standards for the design and delivery of departmental training.

This Quick-Start Guide will help you apply the DHS Training Standards to your work. It contains questions to guide you through the pre-design, design and delivery stages of the instructional design model. Like any quick-start tool, it gets you started, and, for complete information, points you to other sources.

One of these sources is the DHS Training Standards Online Manual — a companion document that has detailed information on many of the topics presented in this guide. The manual has resource information and a printable Checklists and Templates section. Follow this link, www.dhs.state.or.us/training/Tools.htm, to the manual.

If you need assistance with the guide or manual, call 503-373-7316 to speak with a Training and Development Unit staff member.
The ADDIE Model of Instructional System Design (ISD)

This model, developed by Florida State University and selected by the Armed Services in 1975 as the primary means for developing training, shows the five stages of instructional design. It has become an industry standard.

There are questions to think about at each stage. The answers you come up with will help you produce training that incorporates the DHS Training Standards.

(Go to the DHS Training Standards Online Manual if you need help answering the questions.) www.dhs.state.or.us/training/Tools.htm.

The following link offers detailed information on all the stages of ISD in what the author calls an Instructional System Development Manual. (The site has an odd name, but is filled with great training information. Click on the Training tab.)
www.nwlink.com/~donclark/hrd.html

(You evaluate during each phase and at the end.)
What are the Standards?

DHS Training Standards

To ensure that training meets the following standards, trainers should refer to the “DHS Training Standards Quick-Start Guide,” the “DHS Training Standards Online Manual,” and the DHS Office of Communications’ “DHS Design Guide,” and “DHS Style Guide.” Principles of Adult Learning apply to all of the following.

PRE-DESIGN

At DHS, trainers will:

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

DESIGN

At DHS, trainers will:

- Incorporate into objectives, lesson plans, training approaches and evaluation:
  - Adult learning principles;
  - DHS mission, goals, core values and initiatives;
  - Concepts of diversity and cultural competence;
  - Industry standards (Robert Mager, Benjamin Bloom, Donald and James Kirkpatrick).

Select delivery methods using DHS Training Methodologies — Decision Guidelines
DEVELOPMENT/PRESENTATION

At DHS, trainers will:

− Create materials that:
  ▪ Are relevant, legible, at appropriate reading level, conform to DHS Design manuals.
  ▪ Include concepts of diversity and cultural competence.

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

Links to DHS Communications manuals for style and publication guidelines:

www.dhs.state.or.us/admin/comm/style_manual.pdf
www.dhs.state.or.us/admin/wpdt/designguide.pdf
Pre-design

In Pre-Design you answer the following questions:

- What problem or problems need solving?
- Who are the customers, managers, subject matter experts and partners I should involve in this assignment?
- What is the gap between the desired performance and the actual performance? Is it knowledge, skill or attitude that causes the discrepancy?
- Can training solve this problem? Is it a performance problem? (More information will not change performance problems.) Did using Robert Mager’s material on assessment help me determine this?
- Who is the audience? What knowledge and skills do they already have? What knowledge and skills do they need?
- If training is the right solution for this audience, what method from the DHS Training Methodologies — Decisions Guidelines is appropriate?

Consulting Robert Mager’s Performance Model in the DHS Training Standards Online Manual will help you decide if a non-training solution such as feedback or skill practice could solve the problem without training.

www.dhs.state.or.us/training/Tools.htm.

For a complete description of analysis, go to:

www.nwlink.com/~donclark/hrd/sat.html
Design

In the Design stage, you answer the following questions, develop objectives, and select training methods, activities and evaluation schemes to measure success. Then you transfer these to lesson plans with enough detail that another trainer could do the training.

- How have I incorporated the DHS mission, goals, core values and initiatives into my design? Is this clear to others?
- Who are the customers, managers, subject matter experts and partners I am including in planning and pilots?
- How am I checking my design for cultural competence? Who can help me?
- How does my design incorporate the Adult Learning Principles?
- How do the training actions (activities, scenarios, lessons) honor the life experience and learning that DHS employees bring to my sessions?

Here is one example of Adult Learning Principles. See the design section of the online manual for the entire list.

<table>
<thead>
<tr>
<th>Learning Principles</th>
<th>Implications for Course Design</th>
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<tbody>
<tr>
<td>The adult is a partner with the instructor in the learning process.</td>
<td>Participants should actively influence the learning approach.</td>
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For your convenience, there is a complete printable list of principles in the Checklists and Templates Section of the online manual at [www.dhs.state.or.us/training/Tools.htm](http://www.dhs.state.or.us/training/Tools.htm).
Objectives:
- Have I written objectives that:
  - Use clear, precise action words (verbs)? (Choose verbs from Bloom’s Taxonomy);
  - Can be used by any other competent instructor;
  - Ensure that action is intended for the learner’s benefit, not the trainer’s;
  - Leave no doubt on the part of the learner about what action is required;
  - Ensure that performance can be measured? (After an attempt is made, is it possible to tell clearly whether or not the objective has been achieved?)

For the five-part template for writing objectives (shown above), see the Checklists and Templates section in the online manual. [www.dhs.state.or.us/training/Tools.htm](http://www.dhs.state.or.us/training/Tools.htm)
Training Methods:

- Have I compared training methods from the online manual and selected one that fits my training need?
  (See the Design Section in the online manual for DHS Training Methodologies — Decision Guidelines for a comparison of training methods that shows their strengths and challenges. This will help you choose the appropriate ones.)
- Can my learners benefit from instructorless training or do they require a trainer to achieve the desired knowledge and skills?
- Can technology play a role in this training?
- Have I addressed the various learning styles?
- Have I prepared for all three learning modalities?
  (See the Design Section in the online manual for methodologies, learning styles, and learning modalities.)

NOTE: Because all training methods have benefits and disadvantages, you need to consider several factors that balance training needs and expected outcomes with logistics and available resources.

See a complete list of these considerations in the online manual.
Lesson plan:

- Is my lesson plan typewritten? Does it:
- Clearly outline the order, sequence and timing of events;
- Provide and explain strategies for difficult areas of the lesson;
- Include training objectives and overall training goal;
- Describe when and how training packet contents are used;
- List training equipment needed for the lesson;
- Provide transitions between different parts of the lesson;
- List likely answers that come up for questions posed in the lesson plan;
- Include discussion-generating questions to be suggested to the group as needed?

See the Checklists and Templates Section in the online manual for the two-page template for lesson plans and see an example of a completed plan in the Development Section. [www.dhs.state.or.us/training/Tools.htm](http://www.dhs.state.or.us/training/Tools.htm)
Evaluation design:
At the design stage, ask:

- What evaluation methods do I plan to use for each stage of this training?
- Have I used Donald & James Kirkpatrick’s information (in the online manual) to design the minimum (level one) evaluation tool for this training? Is it the only level this training requires? (The higher the level, the more time and effort are required.) Generally, Levels 1 and 2 are within the scope and ability of trainers at DHS.
- How will I measure success — both the individual-learner’s progress in class and the overall result from the class?

For individual learning experiences during class, evaluating at Level 2 is encouraged — your design should indicate how the learners can tell you or show you that they have learned what you intended.

For the two-page master for the standard DHS Training level-1 evaluation form, see the Checklists and Templates Section of the online manual.
Development/presentation

The decisions you made in the pre-design and design stages guide the content and materials of the development stage.

Materials:

Ask:
- Is everything I print, write, draw or copy clear, neat, readable, professional and attractive?
- Is everything appropriate for my audience?
- What training materials will work best for achieving the objectives?
  - Handouts
  - PowerPoint slides
  - Flip charts
  - Posters
  - Marketing materials

NOTE: The staff in the Office of Communications has designed certain “looks” for the various DHS divisions. They can tell you if your particular project needs their editing services.
Have I incorporated the DHS mission, goals, core values and initiatives into my materials/activities? (Trainers should continually incorporate and model the core values and be ready to connect training to the department’s “big picture.”)

- How do my examples, scenarios, and lessons demonstrate cultural competence?
- Have I checked the DHS Style Manual for proper punctuation and other publishing considerations?
- If I incorporate music or video, is it appropriate and relevant, and can my learners easily hear and/or see it?
- Do my examples and scenarios reflect the rich diversity and numerous cultures of the department? (Please remember, diversity is much more than ethnicity.) Ask for feedback from SMEs before going to print.

Link to the DHS Style Manual: www.dhs.state.or.us/admin/comm/style_manual.pdf
While you are presenting the content and activities you have designed and developed, you will also need to ask questions, give feedback, facilitate processes and reinforce learning. For this stage, ask:

**Am I prepared to:**
- Do an opening;
- Facilitate introductions;
- Do context-setting;
- List the objectives;
- Conduct a warm-up exercise?

**As I train, do I:**
- Introduce the topic and explain relevance;
- Show and tell;
- Have learners apply (and practice);
- Clarify, give feedback, discuss results;
- Evaluate success;
- Review;
- Close;
- Give an overall summary;
- Do final testing or evaluation;

Complete information is in the DHS Training Standards Online Manual at www.dhs.state.or.us/training/Tools.htm (case sensitive).
- Have learners set goals to apply learning?

Am I able to manage the classroom: encourage participation, neutralize disruptive behavior, stay on time, and make adjustments to the lesson to fit the group?

During training, how well do I model the core values?

How open am I to comments from individuals from different cultures who may have suggestions (or corrections) that can make this training more culturally competent?

NOTE: It is always a good idea to do one or more pilots and to involve selected individuals from your resource groups to test your design and delivery.

Have I considered:
- Timing for the training;
- Volume of training needed;
- Audience work location;
- Time away from worksite;
- Support required to transfer learning to job?

www.dhs.state.or.us/training/Tools.htm

Link to detailed information about implementation considerations:

www.nwlink.com/~donclark/hrd/sat5.html
Evaluation

The work of Donald and James Kirkpatrick is the industry standard used at DHS for the final stage of the instructional design model. Evaluation refers to the intermediate evaluations done during and after training sessions, and to the continual “mind set” of evaluating against the performance gap you are intending to close, against learning objectives you wrote and against the DHS Training Standards.

In the design stage, you answer the question, “Which evaluation level(s) should I use for this training?” In the development stage, you produce the evaluation form, document, or survey to use.

As a minimum expectation, all DHS training sessions are to be evaluated at Level 1. Evaluating individual learning experiences during class at Level 2 will show how learners are progressing.

More time and effort are required as evaluation levels increase. Levels 1 and 2 are generally within the scope and ability of trainers at DHS. If the benefits justify the time and effort required, Level 2 evaluation at the course level is desirable.

For the two-page master for the standard DHS Training level-1 evaluation form, see the Checklists and Templates Section of the online manual.
Kirkpatricks’ Four Levels of Evaluation

Level 1 - Reaction
- What was the learner’s reaction to the experience?

Level 2 – Learning
- How much did the learners’ knowledge or skill improve? (If possible, have learners take a pre-test as well as a post-test.)

Level 3 – Transfer
- Are the learners using the new behaviors back at their workplaces?

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

See the Evaluation Section of the online manual for further information about Kirkpatrick and the four levels. [www.dhs.state.or.us/training/Tools.htm](http://www.dhs.state.or.us/training/Tools.htm)

The following link leads to broader explanations on evaluations. [www.nwlink.com/~donclark/hrd/sat6.html#kirkpatrick](http://www.nwlink.com/~donclark/hrd/sat6.html#kirkpatrick)
Conclusion

These Training Standards are for the Department of Human Services (DHS) training community — training and development specialists, subject matter experts and staff who do training as part of their jobs.

The standards are meant to create consistently high-quality training across the department.

Find the complete PDF companion document, “The DHS Training Standards Online Manual” at www.dhs.state.or.us/training/Tools.htm.

Thank you for using this Quick-Start Guide to bring the DHS Training Standards into your work. If you have questions or want more information, please call 503-373-7316 and talk with the Training and Development unit staff. They will be happy to assist you.
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