Spring 4-20-2017

Using Training to Increase Standardization and Collaboration Across Teams

Lisa Beck
University of Massachusetts Boston

A final project presented to the faculty of the
Instructional Design Master's Degree Program
University of Massachusetts at Boston

Using Training to Increase Standardization and Collaboration Across Teams

Submitted by

Lisa Beck

in partial fulfillment for the requirement of the degree
MASTER OF EDUCATION

April 20, 2017

Dr. Carol Ann Sharicz

Approved by Dr. Carol Ann Sharicz, Faculty

Abstract

This capstone paper analyzes the effectiveness of a company's current weekly training and its relationship with communication and dispersed teams that work in geographically separated environments. This paper examines a government contracting project and how the inconsistency of the deliverables produced by team members necessitate a need for training improvements. Research from Blayney, Kalyuga, and Sweller, (2015) and Poell, Krogt, Vermulst, Harris, and Simons (2006) on the role of workplace trainers and cognitive load theory support the training improvements presented in this paper. The proposed changes include the introduction of a standardized method of preparing for training and resources to assist trainers in the development of effective training. Additional tools provided are feedback and evaluation forms to be used to gather information on training needs.

Keywords: workplace trainer, communication, standardization, dispersed teams

Table of Contents

Using Training to Increase Standardization and Collaboration Across Teams

Analysis

Background Information

My company has been awarded a government contract doing front-end analysis of current military training. This contract requires teams of four from two different subcontracting companies. The teams are divided evenly and are separated geographically by about ten miles. Each team has a team lead, and there are several people in management positions making key decisions. Team members came on board the project at different dates and received different levels and forms of training.

Each team is responsible for creating a spreadsheet, and these spreadsheets are the deliverables to turn in for review by the key stakeholders in the project. The initial problem the organization was facing was that each team was turning in a different product.

About nine months ago, the leadership team decided to implement weekly trainings to discuss ongoing issues with the project. These trainings have varied in topic and manner of presentation with little to no apparent follow-up or evaluation of how effective these trainings are. Employees have expressed frustration with the lack of preparation of these trainings and a general feeling of "wasted time."

This project involves several key stakeholders with many levels of chain of command due to the nature of working with the government and military organizations. While multiple parties may be interested in the outcome of this project, for the purpose of this project, we will focus on two primary stakeholders: the project manager and the project's government lead contact.

Both the project manager and the government lead expect to see consistent, quality deliverables coming from the contracting teams. The project manager acts as the liaison between the government and the contractors, and he wants both sides to be on the same page regarding the nature of the deliverables. The government lead wants a quality product that he can then present to higher-ranking officers and decision makers in the Navy. The project manager and government lead want the spreadsheets that the teams produce to be structured similarly with the correct data populated.

Supporting Research

One of the contributing factors to the problem of standardizing work seems to be the distance among team members. “Group members at sites separated by even a few kilometers begin to talk in the language of ‘us and them’” (Cramton, 2001, p. 346). There is a noticeable divide among the teams working in separate buildings, and there can be reluctance when sharing information across companies. There are no established procedures for communicating across companies, and teams rarely interact with one another unless attending a project-wide training.

Another issue is the flow of information among teams and leadership. For example, one team had a task to perform and requested guidance from a program manager. The manager met with the team and gave them specific instructions for performing the task. The next week, a different team needed to perform the same task but did not receive the same information, which resulted in their task being performed differently. Information that is necessary to do the tasks for the project is not being evenly distributed among teams. Sometimes team members do not even realize they have not received the necessary information. Cramton (2001) proposes a “’failure to communicate” and “unevenly distributed information” are just some of the problems resulting from a lack of “mutual knowledge” (p. 346). “Mutual knowledge is knowledge that the communicating parties share in common and know they share" (Cramton, 2001, p. 346). These teams appear to lack the mutual knowledge that is necessary to perform their tasks correctly and efficiently. Morgan, Paucar-Caceres, and Wright (2014) write that it is necessary for teams to have "a shared understanding of the processes that will aid them in achieving their goals" (p. 610). The teams can be successful if they share and understand information between them. Like the idea of "mutual knowledge," Herbert Clark studied the use of language and context in interactions, and he described the idea of "common ground" in his work. Common ground is the idea there is a "great mass of knowledge, beliefs, and suppositions" which participants "believe they share" (Clark, 1996, p. 12). Communication seems to increase in efficiency when people understand what each other believes and thinks about a topic. In the case of this project, reaching a group understanding of what is expected of the work would only help standardize the deliverables.

Since the company has already taken the first steps by starting weekly training, the effectiveness of those trainings was analyzed using the needs assessment that was undertaken. Up to this point, the trainings have covered different topics and different people have led the trainings. Most of the time, the person conducting the training is one of the team members who volunteers or who has shown to have knowledge in a certain subject area. These would be considered informal workplace trainers, and they "do not occupy an organizational position that is formally or explicitly linked to employee training" (Poell, Van der Krogt, Vermulst, Harris and Simons, 2006, p. 191). There seems to be varying levels of success with the trainings and varying levels of competency from the trainers. Latif, Jan and Shaheen (2011) identify that "the person who is entrusted with the job to convey the training objectives is the trainer" (p.162). The needs assessment would determine if the trainers entrusted with this job are doing so effectively.

For most of the trainings that have taken place so far, learning objectives are rarely used and if used, only referred to briefly. The use of objectives can be very beneficial to establishing training, and "further data analysis highlights the importance of communicating the training objective and letting participants acknowledge the benefits of training" (Latif et al., 2011, p. 162). Training may be improved by encouraging the use of training objectives and providing opportunities for reflection and feedback. Trainers that have the opportunity for self-reflection "may lead to more awareness of what it is they are doing supporting employee learning" and, consequently, how trainers can continue to improve (Poell et al., 2006, p. 193).

Analysis Plan

For the needs assessment, data was collected on the characteristics of current project team members, opinions on the current state of training, and suggestions for improvement on the current implementation of training.

The needs assessment was conducted using three primary methods: a survey, a focus group of five employees, and a questionnaire given to a member of the management team. The survey was online, and the team members provided anonymous responses to promote honest answers and increase participation. The survey was sent to and answered by 20 employees, which is about 50% of the total workforce on this project. A copy of the survey that was used can be found in Appendix A.

For the focus group, a select group of team members was interviewed in a group using a semi-scripted interview format. The questions, as reflected in Appendix B, were given to the participants in advance to give the interviewees adequate time to prepare their responses and was used to gather qualitative and anecdotal data about the effectiveness of current training and existing needs. Participants also had an opportunity to suggest ideas for improvement of the training process.

The questionnaire was completed by the project manager and provided information on how the management views the efficacy of these trainings and management's suggestions for revision. A copy of the survey questions is located in Appendix C.

Analysis Findings

The survey provided data on the twenty team members' opinions of current training initiatives and demographic data of the employees themselves. Employees had a wide variety of experience levels, and 45% of those surveyed have been a part of this project for more than one year. A majority of those surveyed possess experience in government contract work with 25% having over ten years of experience and 45% having 1-5 years of experience.

When asked about the effectiveness of training, 75% of respondents indicated training at a 1 or 2 when given the scale of 1-5, with 1 being the least effective and 5 being the most effective. Chart 1.1 shows the breakdown in responses to the effectiveness of training question.

Chart 1.1

Participants were also asked about the level of organization of the trainings, and 85% responded that the organization was a 1 or 2 on a scale of 1-5, with 1 being poorly organized. Chart 1.2 reflects the responses given answering the question of organization.

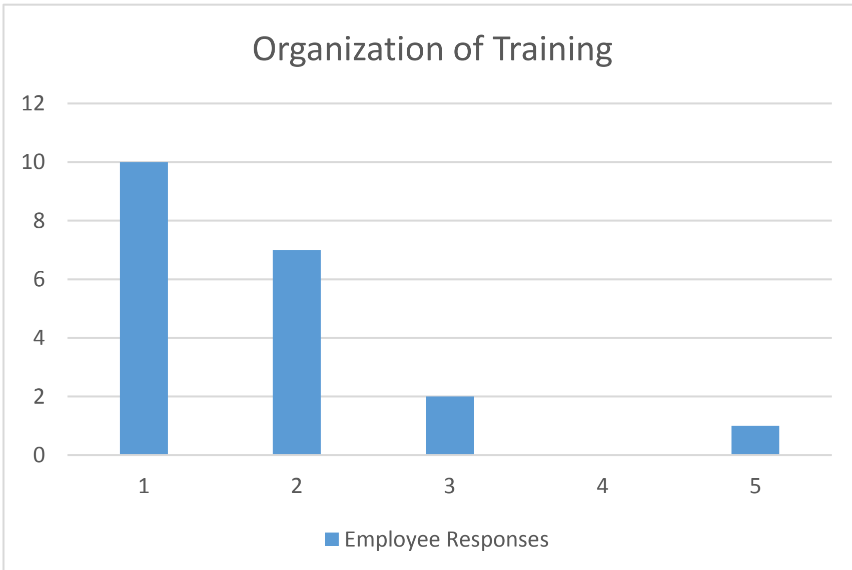


Chart 1.2

When asked if the training was useful and relevant to the work of the project, only 5% of employees responded favorably with a 5 on a scale of 1-5. To assess whether the training was being retained by the employees, participants were asked whether or not they could teach what they had learned in a training to someone else. The answers were split fairly evenly, and Chart 1.3 illustrates the breakdown of responses.

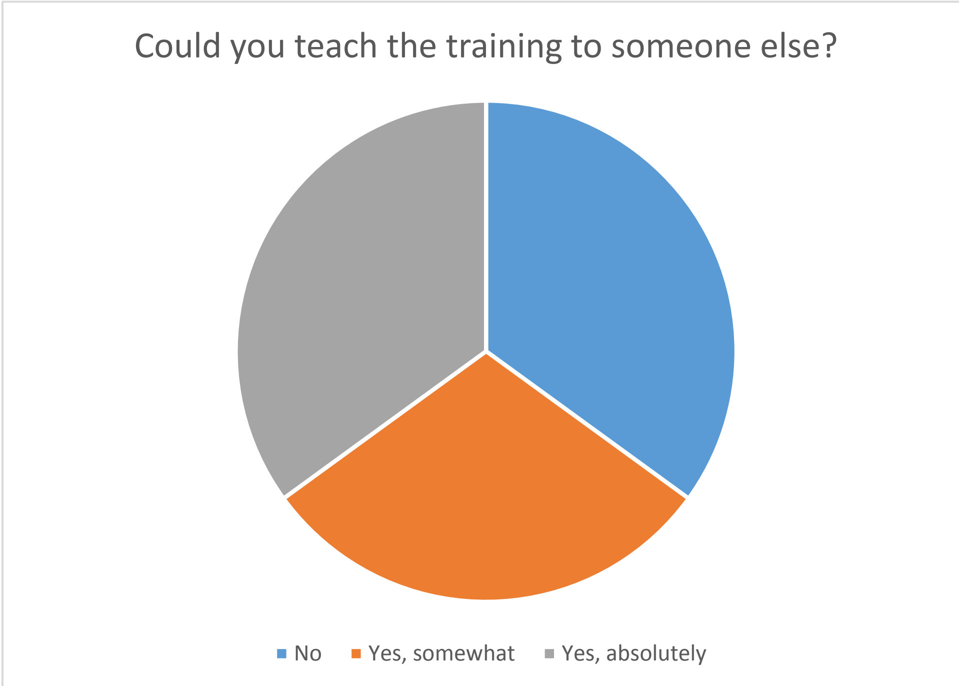


Chart 1.3

Both the survey participants and the members of the focus group were asked what the company was doing well in regards to current training. One-fourth of survey respondents answered "nothing" or "wasting time," and an additional 40% indicated that the best thing about training was that training was attended. One response noted, "It is useful to get together in one location each week to discuss issues." This information shows that there is ample room for improvement concerning the existing training.

All parties involved in the needs assessment, the survey responders, the focus group, and the project manager, were asked what could be done to improve current training. This question yielded the most diverse and relevant answers that will help determine future training initiatives. All of the focus group members and 70% of survey responses cited issues with the trainer and the lack of preparation on behalf of the trainer. Participants requested more informed trainers, and one person wrote that "the trainers need to be a recently competent person" which highlights the need for training to be adaptive and reflective of the ever-changing demands of this project. Additionally, it addresses the need for the trainer to be using the most current and up-to-date processes and methodologies. Another comment that came up repeatedly among survey responses and focus group responses was the desire for the training to be more focused and limiting the time spent on sidebar conversations or arguments among team members. This shows the frustration with the lack of structure at trainings and the wish to use employee time wisely.

The survey, focus group and project manager questionnaire all expressed a need for more prepared trainers, more opportunities to apply the knowledge gained at training, and an avenue for feedback to be obtained to determine the effectiveness of the training and future improvements. While the frustration was seen the most prevalently in the survey responses, it appears that all employees share an enthusiasm to improve and implement some new ways of conducting training.

The results of the needs assessment reinforced the original assumption that there is a lack of standardization in deliverables that is not being addressed by the current training. If team members had an opportunity to receive consistent, organized information on how to do the work, discrepancies among teams could be limited. Due to disorganization and lack of instructor preparation, a more systematic format for training should be implemented to ensure that training needs are being met and efficacy is being evaluated.

To address the need for this type of training, weekly project-wide trainings that utilize standard, reusable training plans to include focused training objectives, space to plan out the week's training, and the opportunities to apply knowledge in a performance setting should be used in the development of this project. This project hopes to help equip the employee in charge of the weekly training to develop a systematic training plan. In addition, evaluation forms were created to judge the efficiency of the trainings and identify areas for further training.

Design

Learning/Performance Objectives

As the needs assessment results demonstrate, the current method of training could benefit from some improvements to its organization and design. The results show a need for more structure in the training to help participants gain the most from these weekly meetings. Due to the issues that were revealed during the course of analysis, the identified instructional goals are for the employee trainer who will be leading the training. The trainer may vary from week to week, so a series of consistent standards will be used to ensure that each training is organized and properly prepared for.

The overall goal for the employee trainer is to create efficient training, so the goal becomes, “Using an instructional plan, the employee trainer will deliver an hour-long block of training to receive an average score of 7 on evaluation forms.” Within that overarching goal, several concrete, sequential goals are identified to develop the skills necessary to attain the larger goal.

Using a training template and input for QA, the employee trainer will:

1. Select a training topic based on current project needs.
2. Create activities for hands-on application during a one-hour block of weekly training.
3. Develop learning objectives for a one-hour block of weekly training.
4. Create an instructional plan for a one-hour block of weekly training.

Disorganization and lack of preparation were cited frequently in the survey and focus group responses, and those problems are addressed by the use of a standard template for training and requiring employee trainers to prepare the training topic using objectives and opportunities for application. The training template will be used to allow space for the trainer to deliberately design their training. By designing their training with objectives and activities in mind, a more focused, applicable training will be created.

Due to the mixed responses when employees were asked if they would be able to teach what they had learned at training to someone else, there is a need for employees to apply what they have learned in training in meaningful ways so that they retain what was presented in the training. For this reason, employee trainers will be asked to consider and plan for opportunities for trainees to apply the new knowledge in a hands-on setting. Trainers will be asked to provide specific examples they will use to illustrate their content so team members will see how their day-to-day work will be affected. These will be required sections in the training template that trainers will use to develop their training lesson.

Instructional Strategy

The overall goal of the proposed instructor training is to create an hour-long block of training using a template, and the instructional plan presented in this project will cover the components of the training template intended to help guide the employee trainer. The purpose of the instructor training is to provide a standardized method of developing training that employees can recreate each week using different training issues that may arise throughout the course of the contract. By using a standard template, each employee is required to plan his/her training lessons using the same criteria. The following are the topics that will be addressed in the employee training lessons.

1. Training goals and purpose of training
2. Participant and instructor information
3. Required materials
4. Developing a short description of training
5. Hand-on practice activities and specific examples
6. Conclusion and evaluation

Employee trainers should strive to create engaging lessons that will help team members retain and apply new information. According to the research of Blayney, Kalyuga, and Sweller (2015), presenting information in an "interactive form was superior to presenting it in isolated form" for knowledgeable learners (p. 209). If a trainer determines that the group to be trained is knowledgeable about the topic, then the learners will benefit from the opportunity to apply their new knowledge and skills. For this reason, the employee trainers will be asked to think about the level of their intended students and how much interactivity their students would benefit from. In the completed questionnaire, the project manager expressed a desire for more hands-on practice at the weekly trainings, so the employee trainer will be asked to plan activities allowing the learner to practice or use the training in a meaningful way.

However, when the learners are novices, it is more advantageous to separate the training into manageable units. Blayney, Kalyuga, and Sweller (2015), in their work on cognitive load theory, advise that "novices may have difficulty processing very complex information in the initial stages of instruction and so should benefit from having the information initially divided into isolated elements" (p. 208). If the training topic is new to learners, they may be considered novices in the area and would benefit from smaller segments of training. Additionally, the group of employees to participate in the training may represent a variety of knowledge and skill levels.

In this instance, the trainer may wish to group the students by ability level in order to provide the appropriate support for training. Using the training template and trainer guide, the employee will determine the needs of the participants and what type of instructional approach would fit for that training.

Development

Instructional Materials

For this project, several documents were created to enhance the weekly trainings. These are materials to help guide the employee trainer through the lesson development process, evaluation forms to gauge the effectiveness of training, and input sheets designed to be used by the quality assurance team to provide information.

The quality assurance (QA) team is made up of government employees whose main task is to evaluate the work submitted by our contracting team. They have checklists in place to guide them through their process, but this feedback is not always making it back to team members in a timely fashion. Sometimes teams do not know that their work is deficient until they are far along in the process. This input sheet was created using terms and information similar to the existing checklists, and it is a straightforward, one-page document in comparison to the lengthy checklists. The QA Training Input sheet, found in Appendix D, provides a space for a QA team member to document the types of problems they are seeing and what part of the checklist it pertains to.   There is also room for them to write suggestions for future training if they have an idea for something specific they think additional training could improve.

Once the employee trainer receives a directive for training from either the QA team or the project manager, he or she will begin to develop the weekly training. To facilitate this, a training template and accompanying instructional presentation have been developed to guide the trainer through this process. The Weekly Training Planning Template, located in Appendix E, shows the necessary elements to be included in training and illustrates how the training lesson plan should be written. Each piece of the planning template highlights an area of the training the employee trainer should consider and prepare for before the training begins. The areas in the template were chosen based on data gathered in the needs assessment and the ideas presented in the research of Blayney, Kalyuga, and Sweller (2015). The employee trainer will have to write training goals, plan for hand-on opportunities, and generate deliberate questions and examples to be used in the session. As preparation was shown to be a problem in previous training, this template ensures that the trainer comes to the lesson prepared with questions, activities, examples, and required materials so that training becomes more efficient. This template will be submitted to the project manager prior to the training for his review and approval.

As a companion to the training template, a PowerPoint presentation has been created to walk the trainer through each piece of the template, giving examples, explanations, and some trainer tips. A portion of this presentation is represented in screenshots found in Appendix F. This presentation is designed to be read through in about 20 minutes and can continue to be used as a reference once the employee trainer begins building the lesson using the template. If an employee is leading a training for the first time, he or she must review this presentation. Once they have used it for the first time, the presentation may be used as a reference tool for any subsequent trainings he or she may develop. This presentation was created using the training template as a guide while providing tips and statistics that resulted from the employee survey.

Once an employee trainer completes a weekly training session, all participants will be given a Weekly Training Feedback sheet to evaluate the training that took place. This feedback sheet, as seen in Appendix G, asks the participants to judge the preparation, organization, and effectiveness of the instructor and the overall presentation. Each element is rated on a numerical scale, and a total score can be calculated from the first 16 questions. The design of this feedback sheet was partially inspired by an existing Navy instructor evaluation, but it was significantly altered to reflect the needs of this project. Since employee trainers have a goal of obtaining at least 40 points, the results from these feedback surveys will be shared with the trainer and the project manager. The project manager can use this information to request more training in certain areas or to help the employee trainer improve in presentation skills.

Implementation

For this project, it was not possible to form a group to pilot this instructional intervention. The results of the needs analysis and developed instructional materials will be shared with the project manager who may choose to implement changes in the future. The project manager seems open to new ideas and willing to make changes necessary to improve training.

Evaluation

Evaluation Plan

To evaluate the training on new planning guidelines, Kirkpatrick's (2006) work on the four levels of evaluation will be used. These evaluations will assess the efficacy of the new weekly training process based on input from team members, team leads, and Tiger Team members. The Tiger Team is a group of contractor team members whose role in the project is to provide guidance and additional support to the teams. Each team is assigned to a Tiger Team member.

Immediately following the training, a short survey, found in Appendix G, will be used to gauge the students' reaction to the training to meet the level 1 evaluation requirements. The weekly training feedback form will ask learners to consider the effectiveness of training and provide insight into certain aspects of the training including presenter preparedness, opportunities for hands-on activities, and how well the presenter handled questions and examples. These will be handed out at the end of each training session, and the results will be shared with both the project manager and the presenter. The trainers will have a general goal to earn at least 40 points, equating to about a 70%, but the project manager may select different individual goals based on the presenter.

In order to evaluate the second level, learning, participants will be asked to work with their teams to construct and modify a sample spreadsheet based on their learning from the training. The participants will also be asked to respond individually to a short survey about their learning and how they will implement their learning. The purpose of these exercises is to determine if the participants are able to use the knowledge acquired in training to complete a task that is similarly structured to their real-world tasks. The sample spreadsheets and survey responses will be submitted to the project manager and Tiger Team members who will use them to evaluate the learning.

For the level 3 evaluation, the application of learning will be considered after the participants return to their regular jobs. The aim is for employees to apply these new guidelines to their tasks. A month after the initial training, evaluation forms will be provided to team leads who will assess their team’s current spreadsheet. These evaluations will be shared with the Tiger Team members who will see if the learning is being applied appropriately. Team leads may continue to conduct these evaluations at their choosing, and the Tiger Team may ask for additional evaluations from team leads if the results are not satisfactory.

At the fourth level of evaluation, the Tiger Team will begin conducting monthly spreadsheet audits using a set of criteria to guide them. The project manager will randomly select the spreadsheets that will be chosen for the audit, and the Tiger Team will submit their results to the project manager. The purpose of these audits is to ensure that the new guidelines are continuing to be enforced in the months following the training. Since this project is only slated to last for another 12-18 months, the monthly audits will begin 2-3 months after the initial training. The criteria used to conduct these audits may change over time as the requirements of the project change and adapt to future goals that may be developed.

Instrumentation

The instrumentation used to evaluate this training will be presented in the form of surveys, practice scenarios, and audit sheets. The content of these instruments may be subject to change as the demands of this project are ever changing.

For the evaluation of learning, teams will complete a sample spreadsheet and follow-up questions in an electronic survey. To do the practice scenario, the participants will be provided with a blank spreadsheet template and the necessary data to complete the task. In their actual jobs, the employees use massive amounts of data to populate their spreadsheets, but for training and evaluation purposes, a smaller data set will be used so that the evaluation can be undertaken in a timely manner. The participants will be asked to work with their teams and complete the given instructions within a timeframe of 1-2 hours. The instruction sheet that will be used is found in Appendix H.

After completing the scenario task, the team members will be asked to individually complete an electronic survey asking them to discuss their lessons learned as well as offering an opportunity for reflection on the learning and practice task. The survey questions are reproduced in Appendix I.

To evaluate the application of knowledge, team leads will be given a checklist to assess their team's current spreadsheet and see if the team is on the right track. The checklist is based on current project requirements with input from the government lead and project manager. The contents of the checklist are available in Appendix J.

For the monthly spreadsheet audits that will be conducted by the Tiger Team, a set of criteria will be used that is based on current project requirements. As mentioned before, due to the fluid nature of this project, these requirements are subject to change, but all team members will be made aware of any changes to the requirements before the audit is conducted. The checklist used for the monthly spreadsheet audits is found in Appendix K.

It is important that all employees are provided with the most current information and guidelines concerning the population of the spreadsheets. If major changes are undergone, additional training will be required.

References

Blayney, P. J., Kalyuga, S., & Sweller, J. (2015). Using cognitive load theory to tailor instruction to levels of accounting students' expertise. *Educational Technology & Society*, *18*(4), 199-210.

Cramton, C. D. (2001). The mutual knowledge problem and its consequences for dispersed collaboration. *Organization Science*, *12*(3), 346-371.

Espinosa, J. A., Nan, N., & Carmel, E. (2015). Temporal distance, communication patterns, and task performance in teams. *Journal of Management Information Systems, 32*(1), 151-191.

Kirkpatrick, D. L., & Kirkpatrick, J. D. (2006). *Evaluating training programs: The four levels*. San Francisco, CA: Berrett-Koehler.

Latif, K. F., Jan, S., & Shaheen, N. (2011). Association of training satisfaction with employee development aspect of job satisfaction. *Journal of Managerial Sciences*, 160-178.

Morgan, L., Paucar-Caceres, A., & Wright, G. (2014). Leading effective global virtual teams: The consequences of methods of communication. *Systemic Practice and Action Research, 27*(6), 607-624.

Poell, R. F., Krogt, F. J., Vermulst, A. A., Harris, R., & Simons, M. (2006). Roles of informal workplace trainers in different organizational contexts: Empirical evidence from Australian companies. *Human Resource Development Quarterly*, *17*(2), 175-198.

Appendix A - Weekly Training Feedback Survey

Weekly Training Feedback

This is a short survey to get some feedback on current training. The information gathered in this survey will be used as part of a needs assessment for my graduate school capstone project. Thank you for helping me with this!

* Required

General Information

1. **How long have you been employed on the Sailor 2025 project? ***
   Mark only one oval.
   - Less than 3 months
   - 3 - 6 months
   - 6 months to 1 year
   - More than 1 year

2. **How many years of experience do you have with government contract work? ***
   Mark only one oval.
   - Less than 6 months
   - 6 months to 1 year
   - 1-5 years
   - 5-10 years
   - Over 10 years

3. **How many years of experience do you have as an instructional designer? ***
   Mark only one oval.
   - No experience
   - Less than 1 year
   - 1-5 years
   - 5-10 years
   - Over 10 years

Opinions on Training

4. **Overall, how effective would you consider the weekly project training to be? ***
   Mark only one oval.

	1	2	3	4	5	
Not effective						Very effective

5. **How would you rate the level of organization of the weekly training? ***
Mark only one oval.

	1	2	3	4	5	
Not organized	◯	◯	◯	◯	◯	Very organized

6. **Is the information provided in the training relevant to your work? ***
Mark only one oval.

	1	2	3	4	5	
Not relevant	◯	◯	◯	◯	◯	Very relevant

7. **Is the information provided in the training useful to your work? ***
Mark only one oval.

	1	2	3	4	5	
Not useful	◯	◯	◯	◯	◯	Very useful

8. **Would you be able to teach what you've learned in a training to someone else? ***
Mark only one oval.

- ◯ No
- ◯ Yes, somewhat
- ◯ Yes, absolutely
- ◯ Other:

9. **How long do you think the training should be each week? ***
Mark only one oval.

- ◯ Less than 1 hour
- ◯ 1-2 hours
- ◯ 2-4 hours
- ◯ All day
- ◯ Other:

10. **Should employees be allowed to attend training via WebEx? ***
Mark only one oval.

- ◯ Yes
- ◯ No
- ◯ Only in certain circumstances
- ◯ Other:

11. **Do you prefer training in person or via WebEx?** *

Mark only one oval.

- In person
- WebEx
- Combination of the two
- Neither
- Other:

Long Form Responses

Please use these spaces to provide additional comments and feedback. You can type more than just one line; it will expand!

12. **What do you think we are doing well at weekly training?** *

13. **What do you think we need to improve at weekly training?** *

14. **Do you have any suggestions for improving weekly training?**

Powered by
Google Forms

Appendix B - Focus Group Interview Questions

Focus Group Questions

1. Are the topics covered in training appropriate and useful? Why or why not?

2. What should our weekly training meetings look like?

3. What would you like to walk away from training with?

4. What suggestions do you have for improving training?

Appendix C - Stakeholder Questionnaire

Stakeholder Questionnaire

Job Title:

1. How are the format and topics for training decided?

2. How is the effectiveness of training evaluated currently?

3. Do you think that weekly training meetings are effective? Why or why not?

4. What changes or suggestions for improvement would you like to see for weekly training?

Appendix D - QA Training Input Form

QA Training Input

Who should participate in training?

- ☐ All team members
- ☐ Contractor Team Leads
- ☐ ISDs (Formerly ISDs 1 & 2)
- ☐ Content Developers
- ☐ NETC Team Leads

Checklist Concern

In which area of the checklist are issues presenting?

- ☐ OCCSTDs
- ☐ Correct-CMS
- ☐ AIM I_AIM II_Content Mapping_BL
- ☐ JDTA to LO Crosswalk-Blocklearn
- ☐ BLA1
- ☐ BLA2
- ☐ BLA3
- ☐ BLA1-BLA2 Recommendations

Description of Performance Problem

What issues are presenting in the RATS?

Training Input (Optional)

Do you have suggestions for training to address this issue? Or any additional comments?

Appendix E - Training Template

Weekly Training: Planning Template

Reason for training:
i.e. QA concern, upper management, team issue, etc.

Training goals:
i.e. Team members will correctly identify content type elements in the Content Mapping tab.

Who is participating in the training?
- ☐ *All team members*
- ☐ *Contractor Team Leads*
- ☐ *ISDs (Formerly ISDs 1 & 2)*
- ☐ *Content Developers*
- ☐ *NETC Team Leads*

How will participants be grouped?
- ☐ Whole group
- ☐ Small Groups (3-5)
- ☐ Pairs
- ☐ Other: ____________________

Required Materials:

Instructor:

Participants:

Short description of training:
1-2 sentences, to be sent to participants in advance of training

Outline of Training:

Space to plan training activities.

Examples:

Specific examples to be used to illustrate training concepts. I.e. CTN_RATS_20160429_v3. Which RATS? Where is it accessed?

Questions to Ask:

Plan for guiding questions to encourage understanding.

Application of Training:

Hands-on practice activities to apply new knowledge or skills

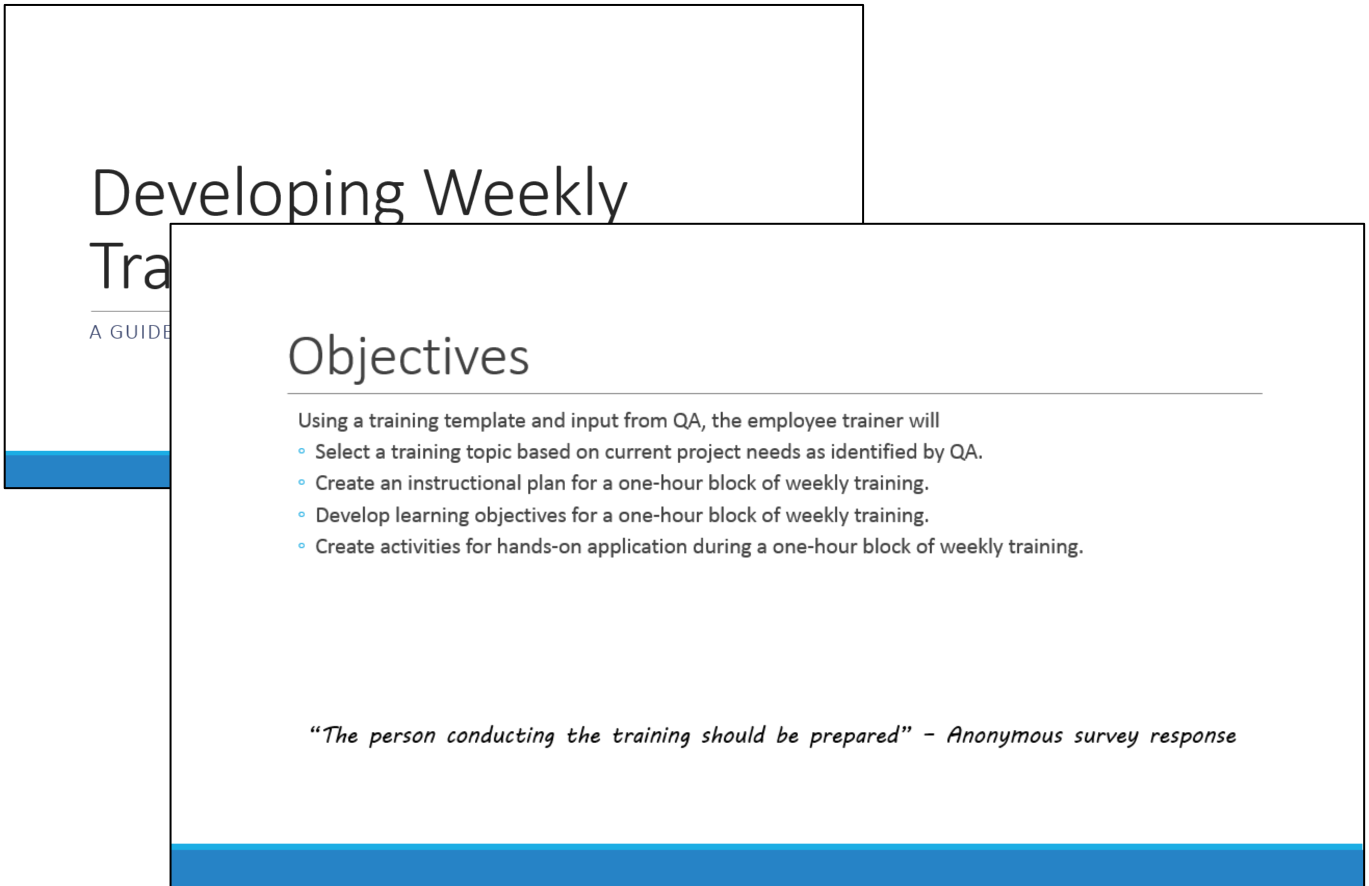
Conclusion of Training:

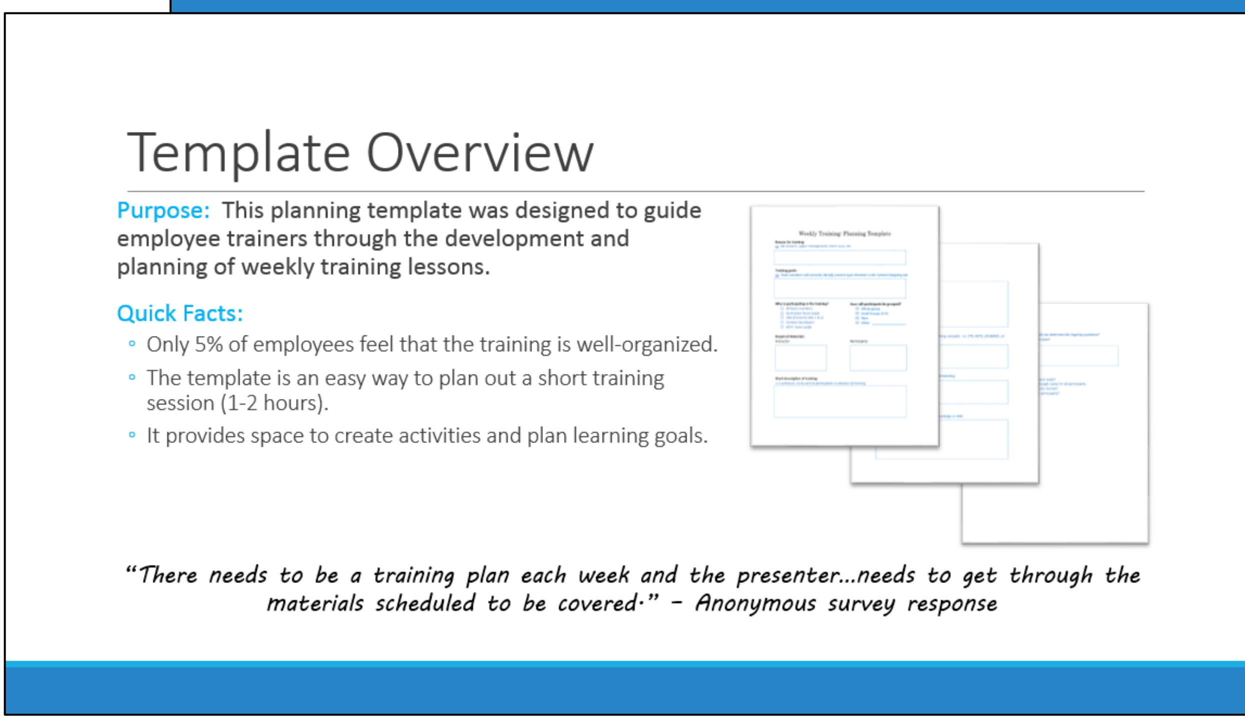
How will you wrap things up? How will you determine the lingering questions?
i.e. on index cards, post-it notes, chart paper

Evaluation Forms:

- ☐ Are evaluation forms printed and ready?
    - Make sure there are enough copies for all participants.
- ☐ Are they available in an electronic format?
    - Has it been emailed to participants?

Appendix F - Training Presentation Screenshots

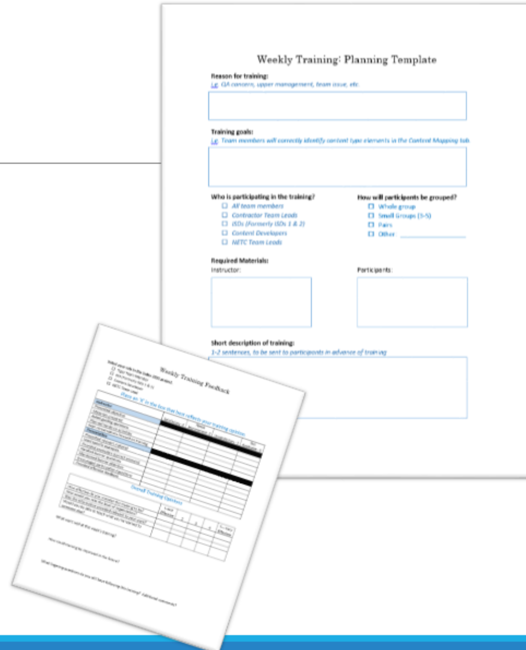




Template: Page 1

Sections included in the first page of the template:

- Reason for training
- Training goals
- Who is participating in the training?
- How will participants be grouped?
- Required materials for the participants and the instructor
- Short description of training – 1-2 sentences



Weekly Training: Planning Template

Reason for training:
I.e. QA concern, upper management, team issue, etc.

Training goals:
I.e. Team members will correctly identify content type elements in the Content Mapping tab

Who is participating in the training?
- ☐ All team members
- ☐ Contractor Team Leads
- ☐ ISDs (Formerly ISDs 1 & 2)
- ☐ Content Developers
- ☐ NETC Team Leads

How will participants be grouped?
- ☐ Whole group
- ☐ Small Groups (3-5)
- ☐ Pairs
- ☐ Other: ____________

Required Materials:
Instructor:
Participants:

Short description of training:
1-2 sentences, to be sent to participants in advance of training

Weekly Training Feedback

Trainer Tip: Use this to send out information to team members in advance!

Creating Training Goals

Why it's important to write goals:

- Determines what the learner will accomplish
- Guides instructor in staying focused on the objective
- Provides a benchmark to gauge effectiveness

Another way of looking at it… our goals should be SMART!

S - specific

M - measurable

A - action-oriented

R - relevant

T - time-based (in a given time frame, i.e. by next month, in one hour, etc.)

Trainer Tip: We can use a similar method of writing goals like the objectives for our RATS courses. Condition + Behavior + Standard!

Appendix G - Weekly Training Feedback

Weekly Training Feedback

Select your role in the Sailor 2025 project.

- ☐ Tiger Team Member
- ☐ ISD (Formerly ISDs 1 & 2)
- ☐ Content Developer
- ☐ NETC Team Lead

Place an 'X' in the box that best reflects your training opinion.

	Satisfactory -3	Needs Improvement -2	Unsatisfactory - 1	Not Applicable - 0
Instructor				
Presented objective				
Materials prepared				
Asked guiding questions				
Planned hands-on activities				
Kept conversations focused on training				
Presentation				
Presented relevant material				
Used specific examples				
Provided exemplars (correct answers)				
Handled learner questions				
Maintained learner attention				
Encouraged participation/questions				
Provided effective feedback				

Overall Training Opinions

	1-Not Effective	2	3	4	5 – Very Effective
How effective do you consider this training to be?					
How would you rate the level of organization?					
Was the information provided relevant to your work?					
Would you be able to teach what you've learned to someone else?					

What went well at this week's training?

How could training be improved in the future?

What lingering questions do you still have following this training? Additional comments?

Appendix H - Level II Evaluation: Learning

Team Members,

Your task is to work together to populate a blank spreadsheet template. You will be given sample data to work with, and you must follow the newest version of the Standard Operating Procedures (SOP Rev. 4) to complete the task.

The following tasks must be completed and will be evaluated using the rubric below.

You have as much time as you need, but this should not take more than two hours.

Team Member names:

____

Role according to SOP:	Task:	Points:
Database	Copy the OCCSTDs, NECs, and CMS events into the appropriate tabs.	10 points
Workforce/Database	Deconstruct the NECs.	10 points
Workforce/Database	Separate OCCSTDs into Tasks and Subtasks correctly.	10 points
Workforce/Database	Align OCCSTDs and NECs logically according to SOP numbering and guidelines.	20 points
ISD	Copy and paste the COI into the Content Mapping tab.	10 points
ISD	Complete Content Mapping.	20 points
ISD	Complete Crosswalk Block Learn tab.	20 points
Team Total:		

Reviewer comments:

Appendix I - Level II Evaluation: Learning

Team Member Survey

Post-Training

1. A major goal of the training was "Given a complete set of data, team members will populate the current spreadsheet template using the latest guidelines with at least 80% accuracy."

How would you rate your level of confidence in your ability to do this? (circle one)

Not Confident at All 1……2……3……4……5 Extremely Confident

2. How will you incorporate what you learned at the training into your daily tasks?

3. How did your previous work differ from the team practice task you did today?

4. How did the practice task strengthen your learning or understanding?

5. What are the lessons learned that you can take away from today's task?

6. Do you have any additional comments or questions?

Appendix J - Level III Evaluation: Behavior

Team Leads,

This checklist is to be used to evaluate your team's current spreadsheet. This is for your own situational awareness as well as for the Tiger Team's review.

Learning Center/Rating: ___________________________________

Team Lead: ____

Tab	Tasks	Performed Correctly (mark with an "X" if yes)	Comments
OCCSTDs	-Copied correctly. -Verified by learning center.	________ ________	
NECs	-Copied correctly. -Deconstructed correctly.	________ ________	
Correct-CMS	-Copied correctly. - Verified by learning center.	________ ________	
Align NEC to OCCSTD	-OCCSTDs separated. -Aligned logically. -NECs aligned to OCCSTD task. - Verified by learning center.	________ ________ ________ ________	
RTM Alignment	-Copied correctly. -Aligned logically. -Verified by learning center.	________ ________ ________	
PQS Alignment	-Copied correctly. -Aligned logically. -Verified by learning center.	________ ________ ________	
CMS Alignment	-Copied correctly. -Aligned logically. -Verified by learning center.	________ ________ ________	

Appendix K - Level IV Evaluation: Results

Monthly Audit Sheet

Learning Center/Rating: ______________________________________

Team Lead: ____

Tiger Team Member: ____

Tab	Tasks	Performed Correctly (mark with an "X" if yes)	Comments
OCCSTDs	-Copied correctly. -Verified by learning center.	________ ________	
NECs	-Copied correctly. -Deconstructed correctly.	________ ________	
Correct-CMS	-Copied correctly. - Verified by learning center.	________ ________	
Align NEC to OCCSTD	-OCCSTDs separated. -Aligned logically. -NECs aligned to OCCSTD task. - Verified by learning center.	________ ________ ________ ________	
RTM Alignment	-Copied correctly. -Aligned logically. -Verified by learning center.	________ ________ ________	
PQS Alignment	-Copied correctly. -Aligned logically. -Verified by learning center.	________ ________ ________	
CMS Alignment	-Copied correctly. -Aligned logically. -Verified by learning center.	________ ________ ________	