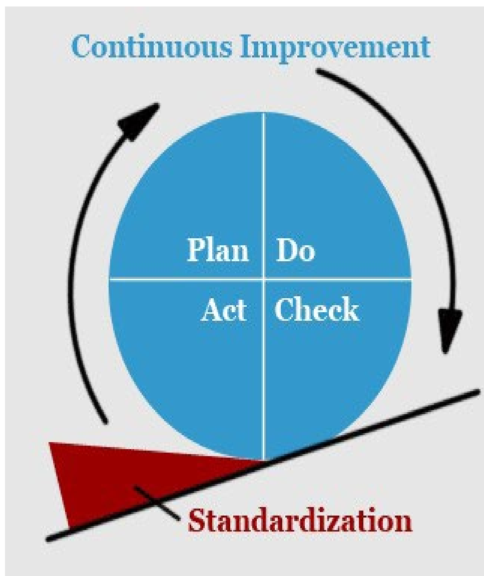
The ADDIE Model

Instructional Design Workbook for Records Managers



ADDIE is a comprehensive, systematic, and detailed Instructional Systems Design (ISD) training strategy to provide consistency and allow one to measure and adapt training needs in a coordinated manner. This plan will also track and analyze metrics and feedback obtained from stakeholders before, during, and after training events in order to allow for continuous improvements.

It is based upon the ADDIE model, which is a systematic, step by step framework used by trainers to ensure four goals are met.

A	Analysis	Answers: What is the Performance Goal?
D	Design	Answers: How will Learners accomplish the Performance Goal?
D	Development	Meeting the Objectives
I	Implementation	Delivering the Solution
E	Evaluation	Ensuring Quality

Specifically, these goals include:

1) learners will achieve the goals of the lesson
2) evaluation of the learners needs
3) design and development of training materials
4) evaluation of the effectiveness of the training using processes with specific, measurable outcomes

This plan will focus your education resources to provide targeted, timely records management training to increase understanding and compliance with NARA regulations, encourage the regulated Records Management (RM) community towards better RM, to go beyond compliance and embrace RM stewardship, and promote, improve, and encourage an open dialogue between NARA and its customers.

I. ANALYSIS

One of the most important steps in the development of a training program is the initial analysis/assessment. As stated in the ADDIE model "during analysis, the designer identifies the learning problem, the goals and objectives, the audience's needs, existing knowledge, and any other relevant characteristics. Analysis also considers the learning environment, any constraints, the delivery options, and the timeline for the project."

The steps to perform when developing training is:

- Perform a Needs Assessment
- Develop a Problem Statement
- Establish Goal(s)
- Determine what Activities/Outputs will be performed
- Determine what Outcomes are desired

Needs Assessment

The first step in initial analysis/assessment of programs is to perform a Needs Assessment of the target audience. The University of Arizona Cooperative Extension Service (UACES) states "there are many methods of learning about clientele needs, including use of existing data, conducting surveys, community forums of focus groups, and working with advisory committees or key informants." Determining the needs of your audience(s) can be done by performing the following steps:

- Evaluate existing data to find what issues need emphasis – identify and target the most important compliance improvement opportunities
- Justification - does the level of training intervention correlate to significant benefits
- Hold stakeholder meetings with internal and external stakeholders to get input
- Survey the target audience(s) to find out what they think is important
- Develop a committee made up of staff to evaluate the data and plan the training

Problem Statement

After a needs assessment has been performed you can develop a Problem Statement which is a brief statement explaining the need for the program. A problem statement could be something as simple as: "NARA data indicates only 85% of Records Managers in our community are in compliance with NARA regulations."

Goal(s)

The next step in the process is to develop goals for the life of the program. An example of a goal statement using the above example could be "Ensure that the rate of Records Management compliance is at least 95%."

Activities/Outputs

Development of training is the next step. These are the actual things that you will do to achieve your program goal(s). In your case, the activity will be a blended solution on your LMS, to include awareness videos, targeted intervention lessons, video conference training. However, to really ensure the achievement of your goal(s), other activities should be performed such as compliance evaluations, advisories, SME focus groups, and reviewing bulletins.

Outcomes

The outcomes of the program are the actual impact the program anticipates for the target audience. The outcomes are usually grouped as short, medium, and long-term outcomes, which can be further expanded as follows:

Short: Change in –

- Knowledge
- Skills
- Attitude
- Motivation
- Awareness

Medium: Change in –

- Behaviors
- Practices
- Polices
- Procedures

Long: Change in situation–

- RM Compliance
- Agency RM conditions

UACES has an excellent website dealing with the subject of Program Planning and Evaluation. The website, entitled "The University of Arizona Cooperative Extension Program Planning Website" is available at http://extension.arizona.edu/evaluation/. The website provides links to other University Extension Systems, so you can gather even more information on the subject.

TRAINING ANALYSIS CHECKLIST

Name/Date: ______________________

Needs Assessment

Methods used/justification:

____

____

____

Problem Statement

____

____

____

Goal(s)

____

____

____

Training Strategy

____

____

____

Outcomes

Short

____

Medium

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Long

____

II. Design

In the Design phase of training development, you are planning (designing) how the training lesson should look to meet the needs identified in the Analysis phase. The Design phase is where you are creating the blueprint of your training lesson.

At the start of the Design phase, you should have a pretty good idea of what the participants will already know when they start the lesson. You should also know what participants will need to learn during the lesson. You should have these answers from the Analysis phase.

Next, you review the lesson's learning objectives/outcomes from the Analysis phase and consider the following questions:

- How should lesson content be organized?
- How should ideas be presented to participants?
- What delivery format should be used?

- What types of activities and exercises will best help participants?
- How should the lesson measure participants' accomplishments?

The answers to these questions help you produce the instructional design document. This document describes the lesson structure and its instructional strategies.

During the Design phase, you do not create the lesson content. The actual lesson content and training materials will be created during the Development phase.

There are basically three steps in the Design phase:

- Plan the instructional strategy
- Select the lesson format
- Write the instructional design document

Instructional Strategy

Developing an Instructional Strategy

At this point in the Design process, you make important choices about the lesson's structure and its methods. Overall, these choices combine to form a comprehensive instructional strategy to help people achieve the lesson's learning objectives.

You draw upon theoretical knowledge and practical experience when you create instructional strategies for lessons.

There are many ways to sequence and present content to participants. It's your responsibility to choose the correct instructional strategies for the lesson and the participants.

There are three issues that you should consider in creating an instructional strategy:

- How will lesson material be grouped and sequenced?
- What instructional methods and tactics will be used to present material?

- How will assessments measure a participant's success?

These three issues often overlap with each other; a choice in one area may affect the other areas.

Grouping and Sequencing Content

You must decide if any of the lesson's learning objectives should be grouped together. You can't teach everything at once, but sometimes it makes sense to put related topics together for the participants. These related topics can form the basis for a training module.

Once topics have been grouped together, you have to organize the content into training structure. The content inside of each group needs to be sequenced and then the groups themselves need to be sequenced together to form the lesson structure. Here are just a few of the many possible sequencing options:

- Step-by-step
- Part-to-whole
- Whole-to-part
- Known-to-unknown
- General-to-specific

As you can see, there are many ways to organize and present lesson material. You choose the structure that makes the most sense for the participants and the lesson content for your program and audience.

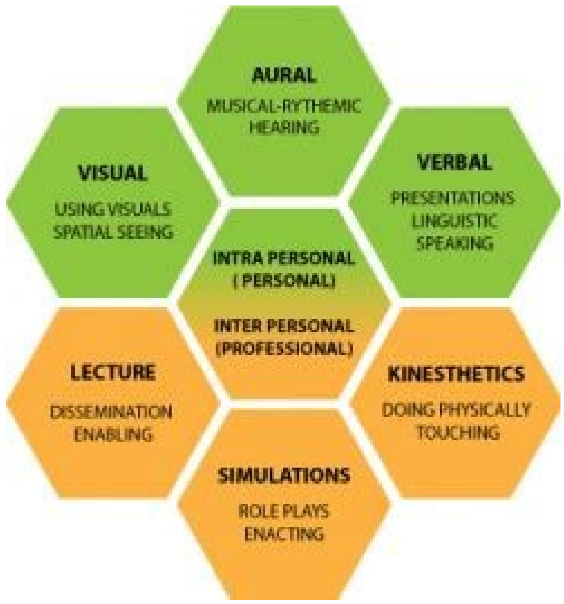
Choosing Methods and Tactics

In the Design phase, you also have to decide how the lesson material will be presented to the participants.

Here are a few examples of the different types of learning activities or exercises:

- Group discussions (Google Meet with SME)

- SME Modeling with Training Material
- Online Scenarios, as developed in RISE-Storyline
- Mnemonics Infographics
- Short Web, LMS, Awareness Videos



Designing Assessments

During the Analysis phase, you created the learning objectives that defined measurable tasks and criteria for success. Now, in the Design phase, you need to create assessment tools that will measure the participants' progress.

The lesson's assessments should measure a participant's progress towards each of the learning objectives. The types of assessment must fit the learning objective.

Selecting the Lesson Format

The lesson delivery method impacts how participants experience the lesson and its content. If you choose the right delivery method, it will make the learning process easier for the participants.

However, if the delivery format doesn't fit the content and participant's needs, then the lesson will have very limited success.

Lesson Delivery Options

Here's a list of some of the common lesson delivery formats:

- Instructor-led Google Meet (video conferencing, not-face to face on site)
- Web-PDF self –study materials
- e-Learning – self-paced such as YouTube video or videoconference (webinar)

Instructional Design Documents

At the end of the design phase, you write an instructional design document. This document provides more than just a simple lesson outline; it provides a high-level overview of the entire training solution.

Your instructional design document provides detailed instructions on how to build the lesson, but it doesn't contain any actual lesson content; it's similar to an architect's blueprint.

Generally, an instructional design document will perform the following tasks:

- Describe the overall learning approach
- Identify instructional media choices
- Cluster and sequence objectives
- Describe lesson exercises, activities, and assessments

Together these elements create the overall instructional strategy for the lesson. A short lesson might have a very simple design document, but complex and lengthy lessons can have very detailed design documents.

The instructional design serves as a major quality assurance checkpoint. You and your team discuss and agree to the design before development begins. It's a lot easier to adjust the design than redevelop materials later in the project.

SAMPLE

INSTRUCTIONAL DESIGN DOCUMENT

DESIGN PHASE TEMPLATE

Learning Objectives

At the end of this training, participants will know how to –

1. log on to training portal
2. Maneuver within the training portal
3. Request and complete RM spreadsheet
4. Upload, certify and submit RM spreadsheet

Instructional Strategy

Grouping and Sequencing of Content

a. Training web portal – step-by-step
b. RM spreadsheet – step-by-step

Lesson Assessment

a. Pre Test / Post Test

Lesson Delivery Format

Lesson delivery will be the training LMS.

III. Development Phase

The development phase is where you create and assemble the contents of your training. Lesson materials are produced according to decisions made during the design and analysis phases. It includes determining and developing appropriate activities and evaluation documents to aid your attendees in their quest for better behavior, increased regulatory compliance, stewardship and promotion of sound operations and practices.

The Development phase can be broken down into the following five components:

- Review/revise existing information sources/training materials
- Selecting appropriate methods and media
- Developing all new lesson materials
- Validating lesson materials; and
- Developing an Instructional Management Plan

Review/revise existing literature/training materials

If you have existing training materials – great – <u>but don't skip this step</u>. You will likely have feedback from your last training which needs to be addressed. Moreover, NARA regulations and policy change often; training materials must be updated to reflect these changes. This is your opportunity to make your training even better.

- Review the evaluations and metrics gathered from your last training to determine if lesson materials need revision based on feedback. Revise training materials accordingly.
- Update existing training materials to reflect regulatory and policy changes.
- Search for additional/improved training materials that can be incorporated into your training both from within your training development system and elsewhere. Revise training materials if warranted. *

*If new materials need to be developed, see "Developing all new lesson materials below" for guidance. Refer to: https://www.archives.gov/records-mgmt/training/bulletins-reformatted

Select appropriate methods, media, and instructors

During the design phase, you determined (or at least considered) the sites that will be used for your training. Keep in mind that the physical layout and audio-visual capabilities of the training site may limit you in the methods and media you can choose for your training. For example, they may not allow access to training video platforms like YouTube. Ask yourself – what should the lesson generally entail and what will I need to deliver it. For example, if the training seeks to teach folks how to use your RM Scheduling, then you'll likely want computers/internet access at your training site to demonstrate forms. In selecting your methods and media, you may want to consider the following:

- Assess what your training venue offers? Can you do PowerPoint, show awareness videos/audio clips, Web, LMS, RISE, etc..
- Does your training use a mix of methods, media and delivery? Whenever possible you should use a mix of methods and media. Choose activities that are both fun and help your audience learn the needed skills and knowledge. You'll probably have to pack a lot in little time, so every bit has to advance the group towards its learning goal. Mix practice sessions in with instructional periods for better knowledge retention. Lastly, consider the use of materials that are not created specifically for instruction – such as snippets from movies, TV, magazine ads, etc. (check copyright). "Classrooms that focus on the instructor are rarely places where learning occurs."
- Choose instructors that have appropriate knowledge of the subject for the audience.
- Train our SMEs to videoconference (e.g., Google Meet) as online instructors if necessary, using RISE in conjunction, PowerPoint, technical training, etc.

Develop all new lesson materials

In addition to the actual materials used to teach the lesson (Post on LMS, public facing web page, advertise lessons on your Social Media webpage, etc.) you will need to develop evaluation materials, awareness materials to advertise your training, any information which must be shared in advance of your training (such as prerequisites). Here are some things to consider:

Revise training materials to incorporate new material.

- Check for training materials from other lessons/sources that can be adopted with permission or redesigned for use in your training. Revise as necessary. These could include materials developed in-house but could also be material developed by other outside parties. Care should be taken, however, not to select material just because it is available.
- Focus your lesson materials on the ‘need to knows’ rather than the ‘nice to knows’. Material focus should be Records Management – training to focus on the why of the regulation. i.e., how the Agency benefits from compliance with regulation. Using your evaluation materials (such as a post-test) can help you determine the need-to-know materials.
- Do your materials include a piece on Records Management stewardship?
- Are lesson materials customized to your agency audience?
- Develop evaluation materials. These can be as simple as an exit survey to a post-test with grading. Just make sure that the type of lesson evaluation you develop both provides you with useful feedback to improve your training, and a way to assess whether or not your attendees learned the “must knows.”
- Do your lesson materials meet your learning objectives, and will it work in the training system you’ve chosen?
- Have you included real world RM scenarios that will interest your attendees and promote discussion that will further learning objectives?
- Develop training announcements (your Social Media site), publicity documents, promotion, and other types of marketing materials.

Validate all lesson materials

It’s important to make sure your lesson materials are accurate, complete, and meet all your training goals and objectives.

Share lesson materials with both internal and external stakeholders (SMEs) to get feedback prior to implementation. Stakeholders should review for completeness, regulatory and policy accuracy. People who are trying to learn the regulatory material provide a very rigorous test for your material and they're often very willing to provide candid feedback.

Develop an instructional management plan, e.g., for your new online learning sessions to be conducted.

It is important the lesson is a coherent whole that fosters learning the material, use of tools used, schedules, online presentation material. A good instructional management plan ensures that anyone can step in and conduct the online training session. Develop a guide for longer lessons and Google Meet sessions with SMEs.

- Lesson agenda
- List of key points that must be covered.

IV. Implementation Phase

The Implementation phase follows the Development phase and ensures that

- The lesson meets NARA compliance goals, such as scheduling
- The lesson covers content that learners need to know
- The lesson reflects the learners existing capabilities

It is important that your management communicates the support of a particular training initiative and provides the time for the trainers and support staff to do a thorough job.

Any outreach effort can take the form of E-learning and Google Meet RM training sessions to complement your internal SME's.

V. EVALUATION

Evaluation should be done continuously throughout the ADDIE process and be used to align the proposed targeted training goals with specific measurable results as noted below. Measurement and analysis is the key to continuous improvement of the training provided to attain desired training goals. Success of the training can be measured in one of the following metrics in order of the most preferred to the minimal:

- General improvement in compliance/behaviors/actions and/or increased participation in RM training - compare baseline data vs. post training data
- Improvement in compliance/behaviors/actions for the RM program and topics of concern
- Improvement in compliance/behaviors/actions by attendees or participants
- Retention of new knowledge by attendees or participants
- Increased training attendance or participation

Use of these metrics can be documented for each training seminar in addition to feedback from stakeholders to adapt and revise the training needs for continuous program improvement. In selecting the best measurement above for the training, it is important that emphasis is placed on alignment between the proposed training and the desired results/goals, ease of measurement, and accessibility of data.

The biggest challenge that makes evaluation more difficult within the context of your compliance training includes the following:

- Attendance is usually voluntary, all regulated parties in each sector will not attend
- Compliance has levels of "customer" interest
- Testing might diminish participation
- How to accurately measure how much of the training transferred to the participants work setting at your agency.

One way to evaluate success in delivering skills and understanding to participants is to administer a Knowledge Test with true/false and/or multiple-choice questions. If knowledge testing is chosen, then the following guidance should be applied:

- Create questions that focus on the primary objectives
- Only develop questions to which there were clear answers provided during the lesson
- Develop a test that will take between 10 to 15 minutes to complete
- Have a balanced mix of True/False and Multiple Choice questions

Post training surveys are also an effective means of gauging participant learning, areas needed for future training, and other training improvements and enhancements needed within such areas as instructors, materials, locations etc., (e.g., using online survey services).

Sample surveys are listed in the end of this document.

The LMS will summarize and track all training data. It will be updated by the designated lead.

TRAINING

RESOURCES

Training Questionnaire

Person/s Presenting: ____

Topic: ______________________________Date: _____________

	Needs Improvement		Strongly Agree	
The information presented was well organized	1	2	3	4
The purpose was well defined	1	2	3	4
Made good use of the allotted time	1	2	3	4
The media for training aids added to presentation	1	2	3	4

What suggestions do you have for improving this training?