

## Training Class Scorecard

**Red:** Does not exist  
**Yellow:** Started, Need to improve  
**Green:** Well done  
**NA** Does not apply

### Needs assessment

Criteria	Red	Yellow	Green	NA	Books	Web Sites
A needs assessment has been conducted to determine the need for training or skill development.					Planning and Conducting Needs Assessments by B. Witkin Practical Guide to Needs Assessment by Kavita Gupta Training Needs Assessment by Allison Rossett	astd.org
The competencies and behavioral indicators required for successful job performance are identified for incorporation into the course design.					Handbook for Developing Competency-based Training Programs by William Blank	astd.org
Impact measures of the training have been identified.					Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips The Value of Learning by Patricia and Jack Phillips Numerous other books by Patricia and Jack Phillips	kirkpatrickpartners.com roiinstitute.net

### Objectives

Criteria	Red	Yellow	Green	NA	Books	Web Sites
Reaction objectives (perception of those involved with the program) have been identified (relevance, importance, usefulness of the training.)					Elevators by John Noonan Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips	kirkpatrickpartners.com roiinstitute.net
Clear, understandable learning objectives for each instructional session are derived from tasks or competencies identified from the needs assessment.					Measuring Instructional Results by Robert Mager	cepworldwide.com
Learning objectives describe knowledge and skills required for successful job performance, are specified in observable and measurable terms, and match the proposed learning outcomes.					Measuring Instructional Results by Robert Mager	cepworldwide.com

Criteria	Red	Yellow	Green	NA	Books	Web Sites
Application objectives clearly define the actions participants will take after the training is conducted.					Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips Numerous other books by Patricia and Jack Phillips	kirkpatrickpartners.com roiinstitute.net
Impact objectives based on business measures have been identified.					Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips The Value of Learning by Patricia and Jack Phillips Numerous other books by Patricia and Jack Phillips	kirkpatrickpartners.com roiinstitute.net
For key strategic programs (important, expensive, high-profile initiatives), return-on-investment (ROI) objectives have been identified.					Handbook of Training Evaluation and Measurement Methods by Jack Phillips The Value of Learning by Patricia and Jack Phillips Numerous other books by Patricia and Jack Phillips	roiinstitute.net

## Design

Criteria	Red	Yellow	Green	NA	Books	Web Sites
Content is aligned with strategic goals and objectives of the organization and meets any applicable mandates.					The Value of Learning by Patricia and Jack Phillips Numerous other books by Patricia and Jack Phillips	roiinstitute.net
Instructional methods and techniques (e.g., case study, lecture) support the proposed learning objectives and outcomes and address different learning styles and diverse participant needs.					ASTD Handbook of Instructional Technology by G. Piskurich Instructional Design Theory by M. David Merrill Mastering the Instructional Design Process by Wm. Rothwell Rapid Instructional Design by George Piskurich Pfeiffer Essential Guides to Training Basics by Janis Fisher Chan	astd.org
Design includes a variety of blended learning delivery modalities (e.g., classroom, on-line) to achieve the learning objectives.					<p><b>Distance Learning</b> Distance Learning by Karen Mantyla The McGraw-Hill Handbook of Distance Learning by Alan Chute</p> <p><b>E-Learning</b> ASTD E-Learning Handbook by Allison Rossett The AMA Handbook of E-Learning by George Piskurich</p> <p><b>Social Learning</b> Tapping the Potential of Informal Learning by ASTD</p>	<p><b>Distance Learning</b> acenet.edu /Content /NavigationMenu /ProgramsServices /CLLL /first_stop/distance /index.htm (NOTE: delete spaces before back slashes)</p> <p><b>E-Learning</b> astd.org</p> <p><b>Social Learning</b> socialmediacub.org</p>

Criteria	Red	Yellow	Green	NA	Books	Web Sites
						mashable.com
The design incorporates multiple levels of evaluation as appropriate to the learning outcomes.					Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips	kirkpatrickpartners.com roiinstitute.net

### Lesson Plans

Criteria	Red	Yellow	Green	NA	Books	Web Sites
Lesson plans are developed or modified using learning objectives derived from job performance requirements.						
The lesson plans contain sufficient detail to ensure consistent and repeatable training if taught by different instructors.						
Lesson plans include methods to assess that learning objectives have been met.						

### Training Materials

Criteria	Red	Yellow	Green	NA	Books	Web Sites
Materials reinforce learning and help students practice and apply the content during the class.					How to Write Training Materials by Linda Stonewall	
Materials reinforce the application of learning back on the job.					How to Write Training Materials by Linda Stonewall	
Training materials are kept current.					How to Write Training Materials by Linda Stonewall	
There is a process for material review and approval.					How to Write Training Materials by Linda Stonewall	

## Course evaluation

Criteria	Red	Yellow	Green	NA	Books	Web Sites
A comprehensive end of course evaluation is conducted to identify course strengths and weaknesses and make course improvements. (Level 1-Reaction)					Elevators by John Noonan Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips	kirkpatrickpartners.com roiinstitute.net
Course contains pre and post tests to ensure learning has occurred by the end of the class session. Results (written and performance) are analyzed and used to improve the course. Methods range from formal or informal testing to team and self assessment. (Level 2- Learning)					Measuring Instructional Results by Robert Mager	cepworldwide.com
After the trainee has had an opportunity to apply the learning gained during training, feedback from the trainee and his/her supervisor is collected to determine if behavior change has occurred. (Level 3 – Transfer of knowledge)					Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips Numerous other books by Patricia and Jack Phillips	kirkpatrickpartners.com roiinstitute.net
Strategies have been developed to collect data to determine if application of knowledge or skill learned in class impacts individual or organization performance. (i.e. increased production, improved quality, decreased costs, reduced frequency of accidents, increased customer service, increased teamwork, or other intangibles.). (Level 4 – Results)					Evaluating Training Programs: The Four Levels by Donald Kirkpatrick Handbook of Training Evaluation and Measurement Methods by Jack Phillips The Value of Learning by Patricia and Jack Phillips Numerous other books by Patricia and Jack Phillips	kirkpatrickpartners.com roiinstitute.net
The course includes strategies to collect data to determine if the benefits of the training exceed the time and cost to attend in dollars. (Level 5 – ROI)					Handbook of Training Evaluation and Measurement Methods by Jack Phillips The Value of Learning by Patricia and Jack Phillips Numerous other books by Patricia and Jack Phillips	roiinstitute.net