



Basics of Instructional Design

Master Trainer Certificate Program

Participant Training Manual

Comprehensive Public Training Program



Revised 9/1/2016

BASICS OF INSTRUCTIONAL DESIGN

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COURSE DESCRIPTION

This one-day course is designed to help subject matter experts and other non-trainers develop training for their agencies. Participants will discuss and apply instructional design models, adult learning principles, multiple intelligence theory, and learning preferences to determine training needs and create effective and engaging training.

This course is part of the Master Trainer Certificate.

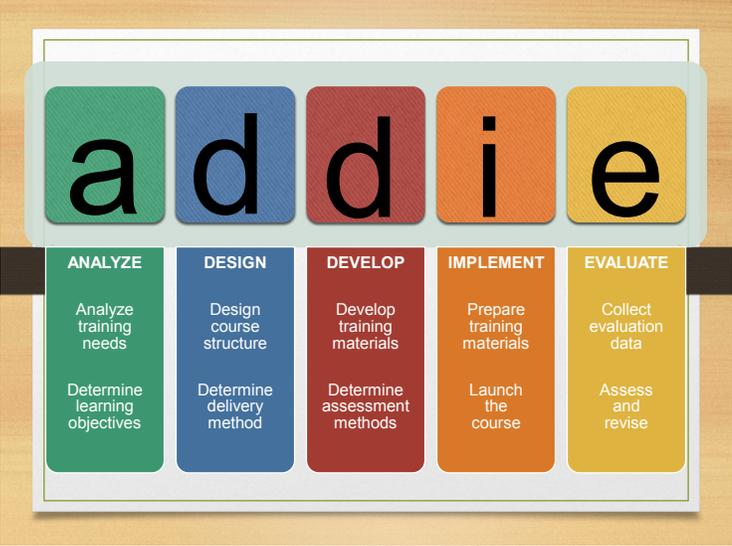
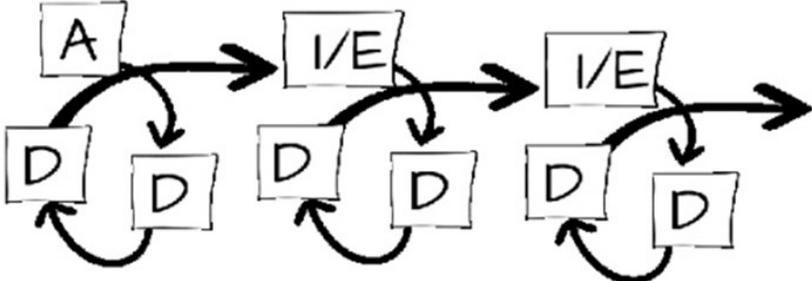
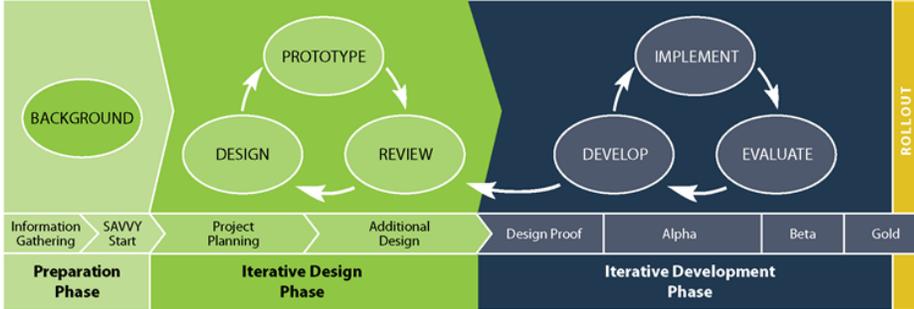
JOB/LEARNING OUTCOMES

By the end of this workshop, attendees will be able to:

- Apply the concepts of instructional design
- Design and develop effective training materials
- Select activities and tools that will aid in the understanding of course topics
- Evaluate training for improvement and revisions

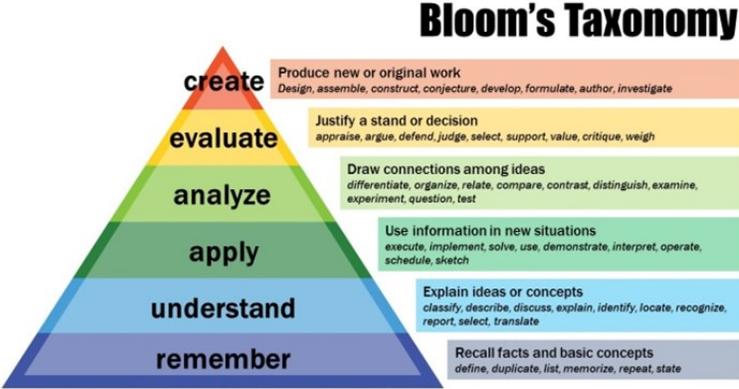
BASICS OF INSTRUCTIONAL DESIGN

LEARNING MODELS AND CONCEPTS YOU NEED TO KNOW

MODELS	NOTES
<p>ADDIE</p> <p>The classic model of the training design process, which includes the steps:</p> <ul style="list-style-type: none"> • Analysis • Design • Development • Implementation • Evaluation 	 <p>The diagram illustrates the ADDIE model as a sequence of five colored boxes, each representing a step with its name and sub-tasks:</p> <ul style="list-style-type: none"> ANALYZE (Green): Analyze training needs, Determine learning objectives DESIGN (Blue): Design course structure, Determine delivery method DEVELOP (Red): Develop training materials, Determine assessment methods IMPLEMENT (Orange): Prepare training materials, Launch the course EVALUATE (Yellow): Collect evaluation data, Assess and revise
<p>AGILE LEARNING DESIGN</p> <p>Any approach to content development that focuses on speed, flexibility, and collaboration</p>	 <p>The diagram shows three iterative cycles. Each cycle starts with 'A' (Analysis), followed by 'D' (Design) and 'E' (Evaluation) in a loop. Arrows indicate the flow from one cycle to the next, showing a continuous and iterative process.</p> <p>Image from LearningSolutionsMag.com</p>
<p>SAM (Successive Approximation Model)</p> <p>An agile content development model that emphasizes collaboration, efficiency, and repetition</p>	 <p>The diagram shows the SAM model divided into three main phases:</p> <ul style="list-style-type: none"> Preparation Phase: Includes 'BACKGROUND' and 'Information Gathering'. Iterative Design Phase: Includes 'SAVVY Start', 'Project Planning', 'Additional Design', 'DESIGN', 'REVIEW', and 'PROTOTYPE'. Iterative Development Phase: Includes 'Design Proof', 'Alpha', 'Beta', 'Gold', 'DEVELOP', 'EVALUATE', and 'IMPLEMENT'. <p>A vertical 'ROLLOUT' bar is shown on the right side of the diagram.</p> <p>Image from AllenInteractions.com</p>

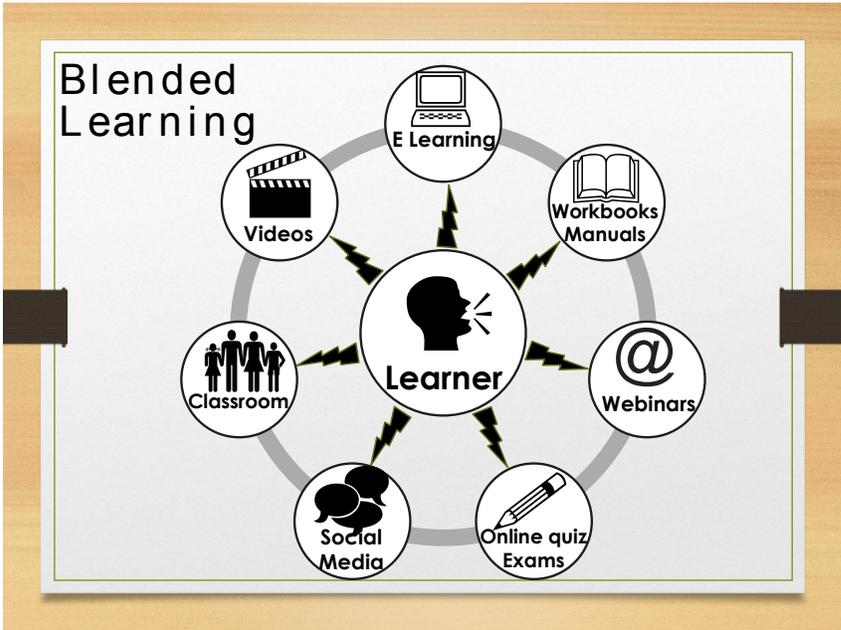
BASICS OF INSTRUCTIONAL DESIGN

LEARNING MODELS AND CONCEPTS YOU NEED TO KNOW

THEORIES/PRINCIPLES	NOTES
<p>ROBERT GAGNE'S CONDITIONS OF LEARNING</p> <p>Gagne identified these nine instructional events. Applying these help to design training and select appropriate media and activities.</p>	 <p>The diagram illustrates Gagne's Nine Events in a circular flow. The events are: 1. Get attention (green circle), 2. Inform learner of objective (blue circle), 3. Stimulate recall of prior learning (red circle), 4. Present information (orange circle), 5. Provide guidance (yellow circle), 6. Elicit performance (green circle), 7. Assess Performance (red circle), 8. Enhance retention and transfer (orange circle), and 9. Provide feedback (blue circle). Arrows indicate a clockwise sequence from event 1 to 9.</p>
<p>BLOOM'S REVISED TAXONOMY</p> <p>In 2001, a group of researchers and theorists revised Bloom's six major categories of Knowledge, Comprehension, Application, Analysis, Synthesis, and Evaluation to action verbs to make them more dynamic. It is most commonly used to assess learning on a variety of cognitive levels.</p>	 <p>The diagram shows Bloom's Taxonomy as a pyramid with six levels, each with associated verbs and descriptions:</p> <ul style="list-style-type: none"> create (top, red): Produce new or original work. Verbs: Design, assemble, construct, conjecture, develop, formulate, author, investigate. evaluate (yellow): Justify a stand or decision. Verbs: appraise, argue, defend, judge, select, support, value, critique, weigh. analyze (green): Draw connections among ideas. Verbs: differentiate, organize, relate, compare, contrast, distinguish, examine, experiment, question, test. apply (light green): Use information in new situations. Verbs: execute, implement, solve, use, demonstrate, interpret, operate, schedule, sketch. understand (blue): Explain ideas or concepts. Verbs: classify, describe, discuss, explain, identify, locate, recognize, report, select, translate. remember (bottom, purple): Recall facts and basic concepts. Verbs: define, duplicate, list, memorize, repeat, state. <p>Image from http://acorn.library.vanderbilt.edu/cgi-bin/isbn-search/0321084055</p>
<p>KOLB'S EXPERIENTIAL LEARNING CYCLE</p> <p>A four stage cycle of the learning process identified by David Kolb in 1984.</p>	 <p>The diagram shows Kolb's Experiential Learning Cycle as a continuous loop of four stages:</p> <ol style="list-style-type: none"> CONCRETE EXPERIENCE (DOING): Having an experience. REFLECTIVE OBSERVATION (REVIEWING): Reflecting on the experience. ABSTRACT CONCEPTUALIZATION (CONCLUDING): Learning from the experience. ACTIVE EXPERIMENTATION (PLANNING): Trying out what you've learned. <p>Arrows indicate a clockwise flow from one stage to the next, forming a continuous cycle.</p>

BASICS OF INSTRUCTIONAL DESIGN

LEARNING MODELS AND CONCEPTS YOU NEED TO KNOW

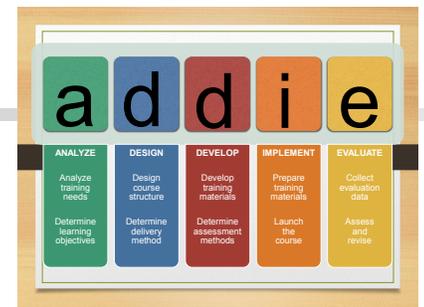
THEORIES/PRINCIPLES	NOTES																								
<p>LEARNING STYLE INVENTORY</p> <p>The three styles of learning include visual, auditory, and kinesthetic (hands-on) learning.</p> <p>Some basic preferences that can indicate learning styles include:</p>	<table border="1"> <thead> <tr> <th></th> <th>VISUAL</th> <th>AUDITORY</th> <th>KINESTHETIC</th> </tr> </thead> <tbody> <tr> <td>When spelling</td> <td><input type="checkbox"/> Do you try to see the words?</td> <td><input type="checkbox"/> Do you say the words aloud?</td> <td><input type="checkbox"/> Do you write words to find if they feel right?</td> </tr> <tr> <td>When speaking</td> <td><input type="checkbox"/> Do you prefer words like: see, picture, image</td> <td><input type="checkbox"/> Do you prefer words like: hear, tune, sounds?</td> <td><input type="checkbox"/> Do you prefer words like: feel, touch, hold</td> </tr> <tr> <td>When reading</td> <td><input type="checkbox"/> Do you like descriptive scenes?</td> <td><input type="checkbox"/> Do you enjoy dialog?</td> <td><input type="checkbox"/> Do you prefer action stories?</td> </tr> <tr> <td>When learning software</td> <td><input type="checkbox"/> Do you prefer pictures and diagrams?</td> <td><input type="checkbox"/> Do you call the help desk?</td> <td><input type="checkbox"/> Do you prefer to work through it yourself?</td> </tr> <tr> <td>When trying to concentrate</td> <td><input type="checkbox"/> Are you distracted by untidiness or movement?</td> <td><input type="checkbox"/> Are you distracted by sound or noise?</td> <td><input type="checkbox"/> Are you distracted by movement near you?</td> </tr> </tbody> </table>		VISUAL	AUDITORY	KINESTHETIC	When spelling	<input type="checkbox"/> Do you try to see the words?	<input type="checkbox"/> Do you say the words aloud?	<input type="checkbox"/> Do you write words to find if they feel right?	When speaking	<input type="checkbox"/> Do you prefer words like: see, picture, image	<input type="checkbox"/> Do you prefer words like: hear, tune, sounds?	<input type="checkbox"/> Do you prefer words like: feel, touch, hold	When reading	<input type="checkbox"/> Do you like descriptive scenes?	<input type="checkbox"/> Do you enjoy dialog?	<input type="checkbox"/> Do you prefer action stories?	When learning software	<input type="checkbox"/> Do you prefer pictures and diagrams?	<input type="checkbox"/> Do you call the help desk?	<input type="checkbox"/> Do you prefer to work through it yourself?	When trying to concentrate	<input type="checkbox"/> Are you distracted by untidiness or movement?	<input type="checkbox"/> Are you distracted by sound or noise?	<input type="checkbox"/> Are you distracted by movement near you?
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<p>BLENDED LEARNING</p> <p>Training initiatives that include using a variety of learning formats, including digital, web-based, job aids, assessments, and face-to-face training.</p>	 <p>The diagram illustrates 'Blended Learning' with a central 'Learner' icon (a head with a speech bubble). Surrounding the learner are seven circular icons representing different learning formats, all connected to the central learner by arrows pointing towards it. The formats are: E Learning (laptop icon), Videos (clapperboard icon), Workbooks Manuals (open book icon), Classroom (group of people icon), Social Media (speech bubbles icon), Webinars (@ symbol icon), and Online quiz Exams (pencil icon).</p>																								

BASICS OF INSTRUCTIONAL DESIGN

KEY TERMS

KEY TERMS	NOTES
COMPETENCIES	Behaviors that demonstrate the knowledge, skills, and abilities as levels of performance in the workplace. (Formal definition: A competency is a set of defined behaviors that provide a structured guide enabling the identification, evaluation, and development of the behaviors in individual employees.)
COURSE	A planned series of learning experiences on a specific topic or group of tasks
E-LEARNING (Electronic Learning)	Term covering a wide set of applications and processes, such as web-based learning, computer-based learning, virtual classrooms, audio programs, videos, and more
ILT (Instructor-led Training)	Traditional classroom training with an instructor/facilitator and students
INFORMAL LEARNING	Learning that is not formally defined and takes place in locations ranging from the workplace to social media
KSAs (Knowledge, Skills, and Abilities)	Knowledge, skills, and abilities (See competencies)
M-LEARNING (Mobile Learning)	Learning that takes place on wireless devices such as smart phones and tablets
MODULE	A unit, especially one that can stand alone, to be learned independent of other units
OBJECTIVES	Training objectives state what will be accomplished as a result of the training.
SME (Subject Matter Expert)	An individual who is proficient in a specific topic area
UNIT	A major subtopic, task, or task cluster to be learned within a course
WBT (Web-based Training)	Delivery of educational content via a Web browser, internet, or intranet

BASICS OF INSTRUCTIONAL DESIGN



Your task is to study your assigned steps of ADDIE below.

- Your group will discuss the notes on the page.
- You'll decide why you feel this step is important to the instructional design process.
- And you'll add anything else you might want to do during this step of instructional design.
- Then you'll be prepared to share your information with us when we get to your step in the course today.

ADDIE	NOTES
ANALYZE	<ul style="list-style-type: none"> <input type="checkbox"/> Gather data <input type="checkbox"/> Analyze training needs <input type="checkbox"/> Identify learner's existing knowledge and skills <input type="checkbox"/> Analyze skill gaps <input type="checkbox"/> Define learning objectives <input type="checkbox"/> Identify timeline and delivery options <input type="checkbox"/> *Continually communicate with stakeholders and revise plans as needed
DESIGN	<ul style="list-style-type: none"> <input type="checkbox"/> Determine how training will be delivered <input type="checkbox"/> Identify and plan the topics <input type="checkbox"/> Decide on the order of topics <input type="checkbox"/> Select training activities to support learning <input type="checkbox"/> Select media to be used <input type="checkbox"/> *Continually communicate with stakeholders and revise plans as needed
DEVELOP	<ul style="list-style-type: none"> <input type="checkbox"/> Develop the content <input type="checkbox"/> Create slide presentation, audiovisuals, and other graphics <input type="checkbox"/> Complete handouts and course materials <input type="checkbox"/> Build the learning activities <input type="checkbox"/> Ensure all elements support the objectives <input type="checkbox"/> *Continually communicate with stakeholders and revise plans as needed
IMPLEMENT	<ul style="list-style-type: none"> <input type="checkbox"/> Create plan to roll out training <input type="checkbox"/> Train others who will be facilitating the courses <input type="checkbox"/> Finalize all course logistics (location, equipment, etc.) <input type="checkbox"/> Utilize checklists to ensure all preparations are complete <input type="checkbox"/> Communicate with potential learners <input type="checkbox"/> Register and confirm attendees <input type="checkbox"/> Present training <input type="checkbox"/> *Continually communicate with stakeholders and revise plans as needed
EVALUATE	<ul style="list-style-type: none"> <input type="checkbox"/> Have learners complete evaluation <input type="checkbox"/> Review test results if applicable <input type="checkbox"/> Observe behaviors to measure results <input type="checkbox"/> Continually analyze results to determine course revisions <input type="checkbox"/> *Continually communicate with stakeholders and revise plans as needed

BASICS OF INSTRUCTIONAL DESIGN - ANALYZE

NEEDS ASSESSMENT

NEEDS ASSESSMENT

What symptoms suggest that a change is needed?

What is the intended result of this training?

Why is this important?

Who requested this training?

AUDIENCE

Who is the intended audience for this training?

What is the difference between what they do now and what they will be able to do after completing this training?

What is their current knowledge level of the topic?

OBJECTIVES

Your group will use the information on page 9 to create three objectives for your class.

By the end of this training, participants will be able to...
(Action Verb + Activity)

-
-
-

BASICS OF INSTRUCTIONAL DESIGN - ANALYZE

CREATING OBJECTIVES

What do you want attendees to be able to do upon completion of this course?
How will you be able to measure this?

Think about these questions:

- What are the most important concepts or skills that trainees need to understand or be able to do by the end of the class?
- Why are these concepts and skills important?
- How will you know that they have understood these correctly?

Characteristics of Well-Written Objectives

- PERFORMANCE: States what the learner will be able to do.
- CONDITIONS: Sometimes performance alone is not enough to explain the desired objective. In these cases, objectives will include the conditions under which the performance is expected to occur.
- CRITERIA: Using SMART concepts (Specific, Measurable, Achievable, Relevant, Time-bound) can help determine the level of performance that is considered acceptable.

ACTION VERBS FOR OBJECTIVES

REMEMBER	UNDERSTAND	APPLY	ANALYZE	CREATE	EVALUATE
cite	describe	apply	analyze	assemble	assess
define	discuss	demonstrate	calculate	build	check
label	explain	employ	categorize	compose	choose
list	identify	interpret	diagnose	design	compare
name	locate	operate	distinguish	establish	estimate
recall	report	perform	inspect	manage	measure
recognize	review	practice	relate	organize	rate
state	summarize	schedule	solve	plan	review
tell	tell	use	test	prepare	select

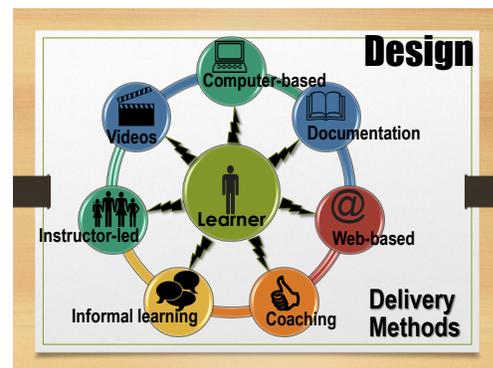
BASICS OF INSTRUCTIONAL DESIGN - DESIGN

DESIGN CONSIDERATIONS

DELIVERY METHODS

Select which formats will best support the information being shared.

- Instructor-led
- Web-based
- Computer-based
- Documentation/Job Aids
- Other:



TOPICS TO BE COVERED

Determine the main topics that will support the objectives.

INTERACTIVITY

Select methods to practice and assess understanding of information for each topic listed in the content outline.

- Discussion
- Demonstrations
- Learning Activities
- Observation
- Feedback
- Tests
- Assessments

BASICS OF INSTRUCTIONAL DESIGN

ORGANIZING CONTENT

Sample Organizational Methods for Course Content:

- Tasks
- Topics
- Problem and solution
- Step by step
- Simple to complex
- Overview to detail
- Specific to general
- Known to unknown
- Present to future

Which organizational methods will you use for your course?

Create a draft of that order below:

BASICS OF INSTRUCTIONAL DESIGN - DEVELOPMENT

RESEARCH

METHOD	DESCRIPTION	<input type="checkbox"/> When would this method of research be good to use? <input type="checkbox"/> Would it be good to define a process or procedure? <input type="checkbox"/> Would it help gain buy-in from potential attendees? <input type="checkbox"/> What could be a drawback in using this form of research? <input type="checkbox"/> Would this work for your case study?
INTERVIEW	Discussion with the person who requested the class can help to find information that needs to be included in the course content.	
SME SURVEYS	Surveys or questionnaires of Subject Matter Experts (SMEs) can be used as a method to identify best practices and detailed information about the topic and processes.	
DISCUSSION	Casual discussions with those involved in the topic can produce more candid information than a formal survey.	
FOCUS GROUP	Formalized discussions with those involved in the topic allows interaction between viewpoints and can enhance buy-in for the course.	
DOCUMENTATION	Review of materials, manuals, and job aids can be useful in determining what information is currently available and what will have to be researched and developed.	
OBSERVATION	Observation of the current processes may be structured by having employees perform specific tasks or it can be unstructured by observing without influencing the employee's actions.	
OTHER	Traditional research methods, such as online investigation and publications, can help determine what others have discovered about the topic.	

BASICS OF INSTRUCTIONAL DESIGN - DEVELOPMENT

LEARNING ACTIVITIES

If you're dealing with hands-on or kinesthetic learners, these activities can help learning occur:	If you're dealing with auditory learners, these activities can help learning occur:	If you're dealing with visual learners, these activities can help learning occur:
<ul style="list-style-type: none"> • Role playing • Handouts • Role playing/games • Hands-on demonstrations • Group or individual projects • Writing on flipcharts/boards • Practicing with tools • Coaching • Written tests • Interactive computer simulations 	<ul style="list-style-type: none"> • Mini-Lectures • Question/Answer sessions • Videos • Demonstrations • Group or individual projects • Panel discussions • Music • Coaching • Oral tests • Interactive computer simulations 	<ul style="list-style-type: none"> • Slide presentations • Handouts • Videos • Demonstrations • Posters, graphics • Writing on flipcharts/boards • Lists • Reference materials • Written test s • Interactive computer simulations

SAMPLE LEARNING ACTIVITIES	NOTES
Case studies	Groups read a real job-related case study and apply what they just learned to determine the course of action.
Discussions	Small group discussions can be a good way for more reserved attendees to feel comfortable discussing the topic. It also also experienced attendees to share knowledge with others.
Icebreakers and Energizers	These activities are designed to either allow the group to get acquainted and become more comfortable with each other or to help raise the energy level of a group. There are numerous collections online and in publications.

BASICS OF INSTRUCTIONAL DESIGN - DEVELOPMENT

LEARNING ACTIVITIES (CONTINUED)

SAMPLE LEARNING ACTIVITIES	NOTES
Role Plays	Participants act out a situation that relates to the topic or uses information that has been learned in the session.
Question and Answer Sessions	Informal question and answer sessions can be effective when the session is updating skills rather than teaching new skills.
Quizzes	Oral or written quizzes can be used as reviews for sections of the course and to assess understanding of the material that has been presented.
Games	Various games can be used to introduce topics or to reinforce or review training materials.
Teach backs	Attendees teach something they have learned in the session to other attendees.

BASICS OF INSTRUCTIONAL DESIGN - DEVELOPMENT

TRAINING MATERIALS

SCRIPT

Create instructional guides that detail the timing, materials, and activities that will be used in the course

- May include specific scripting for others who will be teaching the class
- May also include images of slides to help facilitator ensure he/she is at proper place in program
- May include additional information and resources for facilitator's understanding of the topic

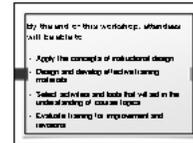
Topic/Timing	Say	Directions/ Materials
INTRODUCTION 8:30 (5 minutes)	Good morning! Welcome to the Basic Instructional Design Workshop. My name is... and I will be facilitating and evaluating your workshop today. Our goal today is for you to be able to create training classes that share needed information, ideas, and practices with others. And we want those classes to be designed with the learners in mind to ensure that those attendees are able to achieve the objectives set out for them at the beginning of the class.	 s. 1
OBJECTIVES 8:35 (5 minutes)	Our objectives that we want to achieve today are these: At the end of this course, you'll be able to: <ul style="list-style-type: none"> • Apply the concepts of instructional design • Design and develop effective training materials • Select activities and tools that will aid in the understanding of course topics • Evaluate training for improvement and revisions 	 s. 2
INTRODUCTIONS 8:40 (15 minutes)	I'm... (give a brief intro of yourself). Now, we'd like to know who you are. You can help us be sure you get what you need from this class by sharing a few things with us. <ul style="list-style-type: none"> • What's your name and department? • Do you know what class that you'll be expected to develop after 	 s. 3

HANDOUTS

Create handouts with information, spaces for writing, and tools to support activities and transfer of learning into workplace

- Manuals that outline the session information to serve as a resource and a place to take notes
- Job aids can include checklists, documentation, and review pages
- Case studies allow participants to practice the workshop information in a real world situation
- Assessments to self-assess current skills or skill gaps
- Evaluations so that attendees can determine the success of their learning experience







SLIDES

Create slide presentation

- Used to present information visually
- Serves as an agenda or outline of the material to be covered
- Can also be used as handouts with places for notes
- Printed copies of slides can be used in case of equipment failure



BASICS OF INSTRUCTIONAL DESIGN - IMPLEMENTATION

COURSE CHECKLIST

- | | |
|--|--|
| <ul style="list-style-type: none"><input type="checkbox"/> Create and send training announcement. Include:<ul style="list-style-type: none">• Title• Course Description• Location• Date and time• Registration information• Presenter/Contact information• Location details (Parking, room, directions, etc.)<input type="checkbox"/> Copy materials.<ul style="list-style-type: none">• Training manual• Handouts• Name tags• Sign-in sheets• Evaluation forms• Tests• Case studies and other activity materials• Signs<input type="checkbox"/> Determine and reserve equipment.<ul style="list-style-type: none">• Computer with necessary software• Remote• Projector• All related cords and connectors• Microphones• Flip charts and stand• Markers• Materials for activities• Training supplies (pens, pencils, paper)• Refreshments (optional) | <ul style="list-style-type: none"><input type="checkbox"/> Arrive early, allowing preparation time.<input type="checkbox"/> Post signs.<input type="checkbox"/> Arrange room setup to encourage interaction.<input type="checkbox"/> Connect audiovisual equipment and test.<input type="checkbox"/> Check visibility from all seats and angles.<input type="checkbox"/> Locate temperature and lighting controls.<input type="checkbox"/> Locate emergency exits and equipment.<input type="checkbox"/> Organize registration.<input type="checkbox"/> Place copied materials as desired .<ul style="list-style-type: none"><input type="checkbox"/> at seats<input type="checkbox"/> registration table,<input type="checkbox"/> facilitator table (for later distribution)<input type="checkbox"/> Greet attendees as they arrive.<input type="checkbox"/> Start on time.<input type="checkbox"/> Conduct training, adjusting based on participant needs.<input type="checkbox"/> Schedule breaks for every 60-90 minutes of training.<input type="checkbox"/> Collect participant evaluation forms.<input type="checkbox"/> Reset room to original condition.<input type="checkbox"/> Compile evaluation results and share.<input type="checkbox"/> Consider adjustments based on evaluation results.<input type="checkbox"/> Send follow up emails and communications to those involved in the training project. |
|--|--|

BASICS OF INSTRUCTIONAL DESIGN - EVALUATION

EVALUATION AND CONTINUED DEVELOPMENT

THE BASICS:

- Create plan for review and revision of materials as needed
- Communicate evaluation results to stakeholders
- Create system to ensure materials are updated and maintained in one location
- Meet with stakeholders to determine what worked and what can be adjusted in future courses
- Notes:

EVALUATION FORM	Needs improvement	Okay, but could be better	Good	Very Good	Excellent
The difficulty level of this training program was appropriate.	1	2	3	4	5
The activities were valuable in understanding the concepts and practicing them.	1	2	3	4	5
The pace of this class was appropriate for the topics covered.	1	2	3	4	5
The class included ample opportunities for active involvement.	1	2	3	4	5
The facilitator was knowledgeable about the subject.	1	2	3	4	5
I obtained the information I needed from this workshop.	1	2	3	4	5
The visual aids were clear and effective.	1	2	3	4	5
The handouts and other resources were useful.	1	2	3	4	5
I will be able to apply what I learned in this workshop.	1	2	3	4	5
I would recommend this workshop to others.	1	2	3	4	5
Comments:					