# Appendix

## Pre-Assignment

Review the list of topics below, taken from the Table of Contents for this course. Beside each topic, place a letter indicating your interest in the topic.

* **X** = Already familiar with the topic
* **I** = Important to you
* **L** = Less important to you
* **N/A** = Not applicable

| Topic | Interest | My Notes |
| --- | --- | --- |
| The Four-Stage Process by David Kolb |  |  |
| Kolb’s Learning Styles |  |  |
| Kirkpatrick’s Levels of Evaluation |  |  |
| Goal Setting |  |  |
| Self Evaluations |  |  |
| Peer Evaluations |  |  |
| Supervisor Evaluations |  |  |
| High-Level Evaluations |  |  |
| Performing a Needs Assessment |  |  |
| Creating Learning Objectives |  |  |
| Drilling Down Into Content |  |  |
| Creating an Evaluation Plan (Who, What, When, How) |  |  |
| Workplace Observation |  |  |
| Objectives Assessment |  |  |
| Pre-Assignments and Pre-Tests |  |  |
| Reviewing Learning Objectives |  |  |
| Performing Hip-Pocket Assessments |  |  |
| Quizzes and Tests |  |  |
| Skill Assessments |  |  |
| Evaluation Timelines |  |  |
| Learning Journal |  |  |
| Creating a Long Term Evaluation Plan |  |  |
| Methods of Long-Term Evaluation |  |  |
| Documenting Lessons Learned |  |  |
| A Basic Return on Investment Formula |  |  |
| Identifying and Measuring Tangible and Intangible Benefits |  |  |
| Calculating Total Costs |  |  |
| Making a Business Case |  |  |

## Worksheet One: 360 Degree Feedback Example (Supervisory Skills)

Evaluator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I am assessing: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Relationship to this person: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Never | Sometimes | Usually | Always |
| Makes time for me when I need to talk |  |  |  |  |
| Helps me set and work towards goals |  |  |  |  |
| Promotes a supportive work environment |  |  |  |  |
| Resolves conflict amongst team members |  |  |  |  |
| Is flexible |  |  |  |  |
| Earns my respect |  |  |  |  |
| Gives me useful, appropriate feedback |  |  |  |  |
| Helps me grow personally |  |  |  |  |
| Helps me grow professionally |  |  |  |  |

## Worksheet Two: Smith Computers Inc.

Andy Jones is a sales manager at Smith Computers Inc. He is sending his team of four salespeople to a comprehensive, three-day training retreat. He has four things he wants to see from the training:

* Better teamwork
* Improved documentation
* 30% fewer customer complaints
* A 10% increase in sales within six months

## Worksheet Three: Evaluation Plan Template

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Evaluation Point | Level of Evaluation | Timeline | Tools | Who Will Perform |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## Worksheet Four: Learning Journal Template

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Training Workshop: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How did I use my training this week?

What challenges did I have?

How did I deal with those challenges?

What do I think I am doing well?

What do I need help with?

What is my plan for getting help?

My next check-in date is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ with \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

## Action Plan

| Module | Goal | Specific? | Measurable? | Achievable? | Relevant? | Timed? | Next Steps |
| --- | --- | --- | --- | --- | --- | --- | --- |
| One |  |  |  |  |  |  |  |
| Two |  |  |  |  |  |  |  |
| Three |  |  |  |  |  |  |  |
| Four |  |  |  |  |  |  |  |
| Five |  |  |  |  |  |  |  |
| Six |  |  |  |  |  |  |  |
| Seven |  |  |  |  |  |  |  |
| Eight |  |  |  |  |  |  |  |
| Nine |  |  |  |  |  |  |  |
| Ten |  |  |  |  |  |  |  |
| Eleven |  |  |  |  |  |  |  |
| Twelve |  |  |  |  |  |  |  |

## Evaluation Form

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Workshop Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | | Workshop Instructor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | | |
|  | | |  | | | | |  | | | | |
| Please rate the following items on a scale of one to ten, with one being abysmal, five being acceptable, and ten being perfect. | | | | | | | | | | | | |
| Workshop Room | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Workshop Facilities | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Instructor Knowledge | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Interactivity of Workshop | 1 | 2 | | 3 | 4 | 5 | 6 | | 7 | 8 | 9 | 10 |
| Comments: | | | | | | | | | | | | |
| Would you recommend this course to others? Why or why not? | | | | | | | | | | | | |
| Other thoughts you would like to share? | | | | | | | | | | | | |

## Recommended Reading List

Barbazette, J. (2006). *Training Needs Assessment: Methods, Tools, and Techniques.* Pfeiffer .

Baugh, L. S., & Jamper, R. J. (1995). *Handbook for Writing Proposals.* NTC Publishing Group.

Charney, C., & Conway, K. (2005). *The Trainer's Tool Kit.* AMACOM.

Kirkpatrick, D. L. (2006). *Evaluating Training Programs: The Four Levels (3rd edition).* Berrett-Koehler Publishers.

Kirkpatrick, D. L., & Kirkpatrick, J. (2007). *Implementing the Four Levels: A Practical Guide for Effective Evaluation of Training Programs.* Berrett-Koehler Publishers.

Merriam-Webster. (2001). *Webster's Business Writing Basics.* Federal Street Press.

Silberman, M. (2006). *The 2006 ASTD Training & Performance Sourcebook.* ASTD Press.

Tamblyn, D., & Weiss, S. (2000). *The Big Book of Humorous Training Games.* McGraw-Hill.

Zinnser, W. (2006). *On Writing Well.* Collins.