

ANALYSIS TEMPLATE BOOK

by

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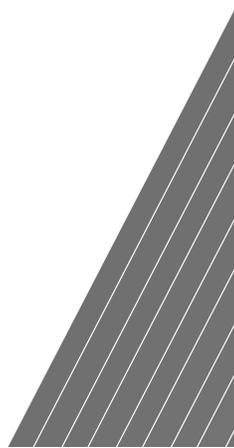


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INTRODUCTION

THE TEMPLATES

These templates were created from Microsoft Word and saved as RTF (Rich Text Format). This allows it to be used by a number of word processors. However, Word would be the best as not all word processors use the same formatting schemes. Also, Microsoft's WordPad, which comes free with Windows, will work to a certain degree, however, a number of formatting errors will occur, such as page numbers being lost and the information in tables not fitting as WordPad has no such features built into it.

Some of the instruments contain two templates: a blank instrument for your use, followed by an example of a completed instrument.

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These templates may be used by training departments, consultants, etc. for analyzing training needs. However, they may not be sold for profit unless prior arrangements are made with the author (Donald Clark).

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SYSTEM OVERVIEW INSTRUMENT

Purpose: To gain an understanding of the system, such as department or process. This will aid the performance process by giving the analysts and developers a background to work from.

1. **Department:**
2. **Date:**
3. **Training Analyst:**
4. **Department Supervisor:**
5. **Summary of Activities:**
6. **Inputs:**
 - A. **People:**
 - B. **Main Material Used:**
 - C. **Main Technologies Used:**
 - D. **Important Time Factors:**
7. **Process:**
8. **Output:**
9. **Problems:**
10. **Background of Proposed Learners:**
 - A. **Average Educational Level:**
 - B. **Average number of years of experience:**
 - C. **Average number of years employed by company:**
 - D. **Required entry level skills and education:**
 - E. **Anticipated number of learners:**
 - F. **Job requirements verses learner's skills:**
 - G. **Language or culture differences of learners:**
 - H. **Motivations of learners:**
 - I. **Physical or mental characteristics of learners:**
 - J. **Specific interests or biases of learners:**

Notes:

SYSTEM OVERVIEW EXAMPLE

Purpose: To gain an understanding of the system, such as department or process. This will aid the performance process by giving the analysts and developers a background to work from.

1. **Department:** Vehicle Maintenance
2. **Date:** February 11, 2001
3. **Training Analyst:** Dorothy Smith
4. **Department Supervisor:** Jim Hamilton
5. **Summary of Activities:** Performs basic maintenance on the company's vehicles. The maintenance program includes basic tune-ups, changing tires, washing and waxing, diagnostic, replacing parts, oil changes, and lubrication. Fleet includes 76 cars.
6. **Inputs:**
 - A. **Number of People:** 11
 - B. **Main Material Used:** Car parts such as tires, brakes, mufflers, batteries, spark plugs. Oil, and lubricants.
 - C. **Main Technologies Used:** Vehicle diagnostic equipment such as multimeters and oscilloscopes. Tool sets. Air wrenches.
 - D. **Important Time Factors:** Due to delivery schedules, the daily preventive maintenance checks on 30 delivery vans must be performed in less than 30 min.
7. **Process:** Vehicles have several preventive maintenance checks and services performed on them periodically (daily, monthly, and quarterly). Broken vehicles are repaired as quickly as possible.
8. **Output:** Well-maintained and operational company vehicles.
9. **Problems:** New personnel have to be trained on the main engine diagnostic machine as most only know the basic capabilities while the full range of its capabilities are used in this shop. They also have to be trained on the newly acquired delivery van's brake system.
10. **Background of Proposed Learners:**
 - A. **Average Educational Level:** 14 years (Technical Trade College)
 - B. **Average number of years of experience:** 6
 - C. **Average number of years employed by company:** 5
 - D. **Required entry level skills and education:** Certificate from trade school or 4 years experience
 - E. **Anticipated number of learners:** Seven, plus future new hires
 - F. **Job requirements verses learner's skills:** Replace brakes (antilock system) on delivery vans - new hires are not familiar with this system. Advanced capabilities of the diagnostic machines.
 - G. **Language or culture differences of learners:** 5 of the employees are from a white middle class background (1 female), 5 are Mexican/American (no females), 1 is Black (male). All are fluent in English. All racial groups seem to respect each other.
 - H. **Motivations of learners:** Highly motivated -- they seem to take pleasure in doing quality work. Newly hired personnel seem eager to learn in order to advance.
 - I. **Physical or mental characteristics of learners:** All seem physical fit. No apparent mental handicaps from observations or records.
 - J. **Specific interests or biases of learners:** Like to talk about cars, racing, women, and sports. Although they seem to respect the one female employee, when she is not around, they sometimes make vulgar jokes about females. This could lead to future problems as the company is presently recruiting more females in all company functions.

Notes

This shop relies on the local technical trade school for the majority of its workers.

JOB LIST EXAMPLE

Purpose: Provides a list of all jobs required for a system, such as department or process. This will aid various Human Resources processes by detailing the staffing requirements.

1. **Department:** Human Resources
2. **Date:** February 11, 2001
3. **Analyst:** Michael Kane
4. **Department Supervisor:** Laura Lambert

Job Title	Job Code	Level	Salary Range	# Auth
Human Resource Director	801		\$65,000 to \$ 75,000	1
Human Resource Information Analyst	805		\$48,000 to \$55,000	1
Labor Relations Representative	809		\$31,000 to \$36,000	1
Employee Training Specialist	815		\$32,000 to \$37,000	3
Compensation Analysis	817		\$35,000 to \$39,000	1
Benefits Planning Analyst	820		\$36,000 to \$44,000	1
Human Resource Generalist	830	2	\$25,000 to 27,000	2
Human Resource Generalist	835	1	\$18,000 to \$23,000	4

JOB DESCRIPTION INSTRUMENT

Purpose: Provides a job description. This will aid various Human Resources processes, such as training or hiring, by detailing the requirements of the job.

- 1. Department:**
- 2. Date:**
- 3. Analyst:**
- 4. Department Supervisor:**
- 5. Job Title:**
- 6. Job Code:**
- 7. Purpose and Description:**
 - A.**
- 8. Supervision required:**
- 9. Number of people supervised:**
- 10. Skills, Education, and Experience required:**
- 11. Special job demands (working conditions, travel, hazards, etc.):**

JOB DESCRIPTION EXAMPLE

Purpose: Provides a job description. This will aid various Human Resources processes, such as training or hiring, by detailing the requirements of the job.

1. **Department:** Sales and Service
2. **Date:** February 11, 2001
3. **Analyst:** Marsha Hide
4. **Department Supervisor:** Sam Gaunter
5. **Job Title:** Customer Service Clerk
6. **Job Code:** 0742
7. **Purpose and Description:**
 - A. Assures that customers receive efficient and courteous service through processing of orders by mail, telephone, or in person.
 - B. Provides pricing and delivery information.
 - C. Receives and answers, customer questions and complaints within established guidelines.
 - D. Acts as liaison between customer and various organization departments.
 - E. Maintains appropriate records and prepares printed reports.
 - F. Operates Computer terminal.
 - G. Performs word processing and related clerical duties.
8. **Supervision required:** Light supervision.
9. **Number of people supervised:** None
10. **Skills, Education, and Experience required:** High School Diploma. Type a minimum of 45 WPM. Prior experience working with a personal computer.
11. **Special job demands (working conditions, travel, hazards, etc.):** Must be able to work in a fast paced environment, be a team player, and maintain good relationships with customers.

TASK INVENTORY INSTRUMENT

Purpose: Provides a list of tasks required by a job. This will aid various Human Resources processes, such as training or setting pay rates, by detailing the tasks to be performed.

1. **Department:**
2. **Date:**
3. **Analyst:**
4. **Department Supervisor:**
5. **Job Title:**
6. **Job Code:**

Task Number	Task

TASK INVENTORY EXAMPLE

Purpose: Provides a list of tasks required by a job. This will aid various Human Resources processes, such as training or setting pay rates, by detailing the tasks to be performed.

1. **Department:** Sales and Service
2. **Date:** February 11, 2001
3. **Analyst:** Barry Lynn
4. **Department Supervisor:** Jane McAlester
5. **Job Title:** Customer Service Clerk
6. **Job Code:** 0742

Task Number	Task
0742-1	Type orders received by mail, telephone, or in person at a minimum rate of 45 WPM into a computer database under general supervision of the Sales Manager to fill customer orders.
0742-2	Receives and answers customer questions under close supervision of the Service Manager in order to provide good customer relations.
0742-3	Delivers pricing and delivery information received by mail, telephone, or in person under general supervision of the Service Manager to fulfill customer requests.
0742-4	Acts as liaison between customer and various departments under close supervision of the Service Manager in order to provide good customer satisfaction.
0742-5	Post and maintains records in a computer database without supervision to provide the company with historical records for statistical needs.
0742-6	Starts, operates, and shuts down a personal computer without supervision to fulfill various company needs.
0742-7	Performs word processing under general supervision of the Service Manager to provide adequate communications between the Sales and Service department, customers, and other departments.
0742-8	Performs general clerical duties, such as filing, typing, and answering telephones without supervision.
0742-9	Performs computer spreadsheet calculations under general supervision of the Service Manager to for fill the Accounting Department's need for up-to-date charge transactions.
0742-10	Prepares printed reports using a computer spreadsheet or database without supervision to provide the company with adequate information.

TASK SURVEY INSTRUMENT

Purpose: To aid in planning and development training programs for your job.

INSTRUCTIONS

The table below contains a list of tasks relating to your job. Below each task is a section to record:

1. The **frequency** the task is performed - Record it as the approximate number of times that it is performed hourly, daily, weekly, etc. For example: 4 times a day.
2. The **criticality** of each task for the successful performance of the job - There are 4 levels. Circle the one that you believe best describes the task:
1) Not important 2) Somewhat important 3) Important 4) Most important
3. The amount of **training required** to reach proficiency - Enter the number of hours that you believe it would take a new hire to become proficient in the job. It is best to use the total amount of training that you received for you to become proficient.

Job Title:

Name:

Department:

Task Number	Task		
	Frequency	Criticality 1 2 3 4	Training Required
	Frequency	Criticality 1 2 3 4	Training Required
	Frequency	Criticality 1 2 3 4	Training Required
	Frequency	Criticality 1 2 3 4	Training Required
	Frequency	Criticality 1 2 3 4	Training Required
	Frequency	Criticality 1 2 3 4	Training Required
	Frequency	Criticality 1 2 3 4	Training Required

TASK SURVEY EXAMPLE

Purpose: To aid in planning and development training programs for your job.

INSTRUCTIONS

The table below contains a list of tasks relating to your job. Below each task is a section to record:

1. The **frequency** the task is performed - Record it as the approximate number of times that it is performed hourly, daily, weekly, etc. For example: 4 times a day.
2. The **criticality** of each task for the successful performance of the job - There are 4 levels. Circle the one that you believe best describes the task:
1) Not important 2) Somewhat important 3) Important 4) Most important
3. The amount of **training required** to reach proficiency - Enter the number of hours that you believe it would take a new hire to become proficient in the job. It is best to use the total amount of training that you received for you to become proficient.

Job Title: Customer Service Representative

Name: Robert May

Department: Order Entry

Task Number	Task		
0742-1	Type orders received by mail, telephone, or in person at a minimum rate of 45 WPM into a computer database under general supervision of the Sales Manager to fill customer orders.		
	Frequency 6 orders per hour	Criticality 1 2 3 4	Training Required 8 hours
0742-3	Delivers pricing and delivery information received by mail, telephone, or in person under general supervision of the Service Manager to fulfill customer requests.		
	Frequency About 2 per hour	Criticality 1 2 3 4	Training Required 4 hours
0742-5	Post and maintains records in a computer database without supervision to provide the company with historical records for statistical needs.		
	Frequency Daily (end of shift)	Criticality 1 2 3 4	Training Required 2 hours
0742-7	Performs word processing under general supervision of the Service Manager to provide adequate communications between the Sales and Service department, customers, and other departments.		
	Frequency Weekly (as required by supervisor)	Criticality 1 2 3 4	Training Required 3 hours
0742-9	Performs computer spreadsheet calculations under general supervision of the Service Manager to for fill the Accounting Department's need for up-to-date charge transactions.		
	Frequency Daily	Criticality 1 2 3 4	Training Required 2 hours

EMPLOYEE SURVEY

We are looking for ways to improve our training program and would like your feedback on your training requirements.

1. Your Job Title:

2. Type of training received. For each type of training or education listed below, check the box that applies to you.

	Could not have done without it	Of great help	Somewhat helpful	No Help	Did not receive
Formal Schooling					
Apprenticeship					
Employer training program					
On the Job Training					
Help from coworkers					
Instruction Manuals					
Job Aids					

3. What type of training would you recommend to someone starting a job like yours?

4. Would further training help you now? And if so, what kind of training?

5. Do you think this organization offers:

- a) Too much training
- b) A good mix of training
- c) The wrong types of training
- d) Too little training
- e) Too much formal training and not enough on-the-job training
- f) Too much on-the-job training and not enough formal training

6. Any comments on how we could improve the company-training program (use back if needed)?

SUPERVISOR & MANAGER TRAINING SURVEY

We are looking for ways to improve our training program and would like your feedback on your staff training requirements.

1. What type of training do you and your employees require?

2. If you could divide 100 percent of the training effort among the following topics, how would you do so?

- Each column should add up to exactly 100 percent.
- Assign no percentage to topics in which you do not want training.
- For the rows listed as “Other,” enter the type of training that you believe is needed.

	For yourself	For your direct reports	For those who report to your direct reports
1. Leadership			
2. Computers			
3. Time Management			
4. Counseling			
5. Performing Reviews			
6. Writing			
7. Other _____			
8. Other _____			
9. Other _____			
10. Other _____			
TOTAL	100%	100%	100%

3. Do you think this organization offers:

- g) Too much training
- h) A good mix of training
- i) The wrong types of training
- j) Too little training
- k) Too much formal training and not enough on-the-job training
- l) Too much on-the-job training and not enough formal training

4. Any comments on how we could improve the company-training program (use back if needed)?

TASK SELECTION INSTRUMENT

Purpose: To determine if a task should be trained. The first four sections are used to determine if it should be trained. The last two sections will be of aid in selecting the type of training. Depending upon the task, not all questions require an answer.

TASK:

1. REQUIRED BY LAW, SAFETY FACTORS, ORGANIZATIONAL REQUIREMENTS

- Is the training mandated by the Occupational Safety and Health Act?
- Is there a chance that someone may hurt or that damages may occur if it is not trained?
- Is training needed to ensure their behavior does not compromise the company's legal position, i.e., equal employment opportunity, labor relations laws, or state laws?
- Is training required to meet an organizational vision or mission?
- Is the training required to meet company goals or objectives?

Generally, any yes answers in this section requires training or another performance initiative. Analyst's recommendation:

2. USE OF ANOTHER PERFORMANCE INITIATIVE

- Is there another solution, such as a job performance aid or self-study packet?
- Can people be hired that have already been trained?
- To what extent can the task be learned on the job?
- Are the demands (perceptual, cognitive, psychomotor or physical) imposed by the task excessive?
- Are other performance interventions required?
- Is there another creative solution that better meets the organization's needs (brainstorming required to correctly answer this question)?

Another performance solution is generally recommended if it is cheaper or if it better meets the organization needs. Analyst's recommendations:

3. RISKS AND BENEFITS

- What will happen if we do not train this task?
- What are the benefits if we train this task?
- How critical is the task?
- What is the consequence if the task is performed incorrectly?

Identifying the risks and benefits helps in arriving at the correct solution. Analyst's recommendations:

4. TASK COMPLEXITY

- How difficult or complex is the task?
- How often is the task performed during a specified time frame (e.g., daily, weekly, monthly, yearly)?
- How much time is needed to perform this task?
- What behaviors are used in its performance?

- How critical is the task to the performance of the job?
- What information is needed to perform the task? What is the source of information?

Generally, complex and frequently performed tasks require training, while simpler and infrequently performed tasks require other performance solutions (such as job performance aids).

5. COLLECTIVE (TEAM CONSIDERATIONS)

- Does execution of the task require coordination between other personnel or with other tasks?
- If it is one of a set of collective tasks, what is the relationship between the various tasks?

Although identifying the collective degree of the task plays a small amount in deciding if a task should be trained, it is a determining factor in deciding how it will be trained.

6. REQUIREMENTS FOR TRAINING

- What are the performance requirements?
- What prerequisite skills, knowledge, and abilities are required to perform the task?
- What behaviors distinguish good performers from poor performers?
- What level of task proficiency would be expected by the department following training?

This section provides training requirements.

FINAL RECOMMENDATION

Performance Intervention Required:

Client's Buy-Off:

Training Departments Buy-Off:

TASK SELECTION EXAMPLE

Purpose: To determine if a task should be trained. The first four sections are used to determine if it should be trained. The last two sections will be of aid in selecting the type of training. Depending upon the task, not all questions require an answer.

TASK: Move a load with a forklift.

1. REQUIRED BY LAW, SAFETY FACTORS, ORGANIZATIONAL REQUIREMENTS

- **Is the training mandated by the Occupational Safety and Health Act?** Yes
- **Is there a chance that someone may hurt or that damages may occur if it is not trained?** Yes
- **Is training needed to ensure their behavior does not compromise the company's legal position, i.e., equal employment opportunity, labor relations laws, or state laws?** Yes
- **Is training required to meet an organizational vision or mission?** Yes (mission) – Provide a Safe working environment for all personal.
- **Is the training required to meet company goals or objectives?** No

Generally, any yes answers in this section requires training or another performance initiative.

Analyst's recommendation: Training must be provided.

2. USE OF ANOTHER PERFORMANCE INITIATIVE

- **Is there another solution, such as a job performance aid or self-study packet?** Yes, part of the training will use a self-study packet to reduce classroom-training time.
- **Can people be hired that have already been trained?** Yes, but we try to promote from within and training must be provided by law.
- **To what extent can the task be learned on the job?** Training will only be provided to ensure they know how to operate safely. The rest of the training will be provided on the job.
- **Are the demands (perceptual, cognitive, psychomotor or physical) imposed by the task excessive?** They require good perception (must be able to place loads 40 feet in the air) and they require some manual dexterity to manipulate the controls. Also, they are required to stand for a long period on a moving platform that vibrates quite hard at times (standup forklifts).
- **Are other performance interventions required?** None at this time.
- **Is there another creative solution that better meets the organization's needs (brainstorming required to correctly answer this question)?**

Another performance solution is generally recommended if it is cheaper or if it better meets the organization needs. **Analyst's recommendations:** A self-study packet will be used, followed by a brief class, demonstrations, and then practice and evaluation.

3. RISKS AND BENEFITS

- **What will happen if we do not train this task?** Accidents likely to occur
- **What are the benefits if we train this task?** We will meet OSHA's requirements.
- **How critical is the task?** Very – must be trained to meet distribution requirements.
- **What is the consequence if the task is performed incorrectly?** Accidents likely to occur

Identifying the risks and benefits helps in arriving at the correct solution. **Analyst's recommendations:** Training required

4. TASK COMPLEXITY

- **How difficult or complex is the task?** Moderate
- **How often is the task performed during a specified time frame (e.g., daily, weekly, monthly, yearly)?** Throughout the day.
- **How much time is needed to perform this task?** Normal task completion is about 7 minutes, however it is performed throughout the day on a continuous basis.
- **What behaviors are used in its performance?** Coordinate movement of material with other personal, works without supervision, and perform basic math.
- **How critical is the task to the performance of the job?** Extremely critical.
- **What information is needed to perform the task?** Name of item, quantity, and location. **What is the source of information?** Receiving paperwork, put-away sheets, and letdown sheets.

Generally, complex and frequently performed tasks require training, while simpler and infrequently performed tasks require other performance solutions (such as job performance aids).

5. COLLECTIVE (TEAM CONSIDERATIONS)

- **Does execution of the task require coordination between other personnel or with other tasks?**
Must work with receivers and pickers to ensure material is in its designated position at the correct time.
- **If it is one of a set of collective tasks, what is the relationship between the various tasks?**

Although identifying the collective degree of the task plays a small amount in deciding if a task should be trained, it is a determining factor in deciding how it will be trained.

6. REQUIREMENTS FOR TRAINING

- **What are the performance requirements?** Material must be located correctly so that it can be found when needed.
- **What prerequisite skills, knowledge, and abilities are required to perform the task?** Basic math skills, knowledge of warehousing operations, and the ability to operate machinery.
- **What behaviors distinguish good performers from poor performers?** Accuracy and being able to operate safely.
- **What level of task proficiency would be expected by the department following training?** Being able to operate a forklift safely.

This section provides training requirements.

FINAL RECOMMENDATION

Performance Intervention Required: Training. Initial assessment is to provide a blend of self-study, classroom, and hands-on training.

Client's Buy-Off: Sue Claxon

Training Departments Buy-Off: John Smith

PEOPLE, DATA, THINGS INSTRUMENT

Purpose: To aid in the analysis process by providing the main function of a job.

Background: Tasks are often characterized by the proportions of time spent on people, data, and things. Performance deficiencies are often the result from a mismatch between the nature of a job, and the employee's preference for focus on people, data, or things. Although most jobs entail that the jobholder works with all three functions, there is usually one or two functions that the job extensively focuses upon. Listing all job responsibilities under one of the three categories will provide the information as to what major role an employee will be expected to fulfill -- a people person, a data person, or a thing person.

Instructions: Table 1, shown below, contains a number of verbs to assist you in selecting the correct category:

People	Data	Things
advising	accounting	agility & speed
briefing	analyzing	assembling
communicating	balancing	calibrating
consulting	budgeting	constructing
coaching	collecting	cooking
facilitating	comparing	crafting
following through	compiling	cutting
giving feedback	computing	growing things
guiding discussions	creating	hammering
influencing	designing	hand & eye coordination
initiating	estimating	handling & packaging
instructing	evaluating	inspecting
interviewing	forecasting	maintaining
managing	idea generating	maneuvering
mentoring	imagining	manufacturing
motivating	interviewing	molding
negotiating	organizing	motor skills
persuading	planning	operating
public speaking	problem solving	painting
selling	researching	preparing
sponsoring	retrieving info	repairing
supervising	surveying	sanding
teaching	sorting	setting up
training	synthesizing	uses hands
tutoring	systematizing	weaving

CHART 1

Using chart 1 as a reference, list the various tasks that the jobholder is required to perform in one of the three columns below. Examining the placement of the tasks will assist you in determining the overall type of person required for the job.

People Functions	Data Functions	Thing Functions

Main Job Functions:

TASK PERFORMANCE MEASURE INSTRUMENT

Purpose: Provides task performance standards for human resource functions, such as performance reviews and training requirements.

1. **Task:**
2. **Conditions:**
3. **Behavior:**
4. **Performance Measure:**
5. **Steps:**

TASK PERFORMANCE MEASURE EXAMPLE

Purpose: Provides task performance standards for human resource functions, such as performance reviews and training requirements.

1. **Task:** Enters projected sales into a computer spreadsheet, performs calculations using built in macros, and forwards sales projection report for use in company planning. This is performed without direct supervision
2. **Conditions:** Given a personal computer with spreadsheet application, built in macros, on-line help, projected sales figures, and no supervision.
3. **Behavior:** Produce a projected sales report.
4. **Performance Measure:** Report must provide needed projections and have no math or input errors.
5. **Steps:**
 1. Turn on computer and start spreadsheet application.
 2. Load projected sales report spreadsheet template (prosale.exl).
 3. Enter projected sales figures into designated spreadsheet cells.
 4. Run spreadsheet macros.
 5. Save file under new name -- pro***.exl, with *** being the next sequential number, for example pro135.exl. Note: Do NOT overwrite template.
 6. Forward to Planning Manager by email.
 7. Exit application.

TRAINING ANALYSIS OVERVIEW REPORT

Purpose: Provides an overall view of the analysis phase.

1. Department:
2. Date:
3. Analyst:
4. Department Supervisor:
5. Desired Program:

GOALS

1. What organizational goal is driving this training?
2. What will the benefit or ROI be?
3. What is the skill gap?
4. What competencies (knowledge, skills, or attitudes) will this program deliver?
5. What factor or evaluation will be used to measure the level of goal achievement?

TARGET POPULATION

1. Who will be trained?
2. What is the estimated class size?
3. How many classes will there be and how long will this training last?
4. What are the knowledge and skill prerequisites?

TYPE OF TRAINING

1. What type of program is being proposed?
2. What media will be employed?

ALTERNATIVES

1. What will happen if we do not delivering the training?
2. What are the restrictions or limitations for delivering a program?
3. What other methods may be used to reach the goal (include limitations and advantages)?

PROJECT PLANNING

1. Estimated timeline:
2. Estimated budgeting:
3. Personal or resources required: