

Training Assessment Toolkit

What is a Training Assessment?

A training assessment is a systematic method for collecting, analyzing, and using information to answer basic questions about training effectiveness.

The training assessment provides data related to training effectiveness and recommendations for training program enhancements. A training assessment can be conducted by subject matter experts (SMEs) as a self-assessment or by training centers to prepare for an external assessment. The assessment instruments in this toolkit can be used.

During the training assessment, the observers will conduct a close examination of a training program. They will ensure student safety protocols and standards of quality are met. The observers will also conduct interviews with staff and students while observing and evaluating:

- Classroom presentations.
- Hands-on lab activities.
- Course content and curriculum.

The length of the assessment is typically two and a half days. The morning of day one consists of the arrival of the observers, introductions, facilities tour, and review of training material. Observation begins on the afternoon of day one. Day two is devoted entirely to observation. The morning of day three consists of an out-briefing with the training center director, training lead, and instructors, during which the constructive feedback and recommendations for improvement will be offered.

Before Conducting a Training Assessment

1. **Identify observers.** The observers should be the first resource identified when planning to conduct a training assessment. Ideally, there should be two observers: a subject matter expert to review technical accuracy and a training specialist to review educational soundness.

Ensure the subject matter experts selected to observe have experience with the material the training center is presenting.

2. **Meet prior to the training assessment.** If the observers are off site, a conference call will suffice. If the observers are in house, meet with them in person. This meeting should involve the training center director, training lead, instructors, and the observers. This meeting is designed to agree on expectations, decide on dates for the training assessment, and answer any questions involved parties may have.

Ensure dates for the training align with the schedules of the training center, training staff, and observers.

The goal from the observers' point of view is to help improve the training center's training process, not to monitor or audit. Observers should strive to



provide constructive feedback and ideas for improvement. Observers should avoid assessing lecture-only trainings and should make sure there is sufficient space available in each training setting for observation and note-taking.

3. **Provide information to the training center.** Prior to conducting the training assessment, the observers should provide the training center with the following items.

- Contact information – this is provided in case there is a change in the schedule.
- Training Assessment Agenda – this is provided to make sure all involved parties can be present at the proper times.
- Travel itinerary (if external observers are used) – this is provided so the training center knows precisely when the observers are arriving and departing.
- Evaluation instruments – these are provided so the training center can have clear expectations on how the observations will be conducted.
 - Classroom Lecture Evaluation Instrument
 - Lab Activity Evaluation Instrument
 - Lesson Plan Evaluation Instrument
- Instructor Interview Form
- Student Interview Form

4. **Provide information to the observers.** Prior to conducting the training assessment, the observers should be provided with the following items.

- Contact information – this is provided as a courtesy so all parties involved can be in contact with each other, especially if travel problems arise.
- List of instructors being observed and their experience level – this is provided so the observers can provide a fair and accurate assessment based on instructor experience level.
- The training schedule – this is provided so observers can find the proper times to plan interviews with instructors and students, while aiming to not disrupt the flow of class.
- Training materials – these are provided so observers get a cursory glance of the training materials before arriving on site. Observers will also review the materials to make sure the content, training schedule, and assessments have the proper components.



**During a
Training
Assessment**

1. **Conduct a welcome meeting at the start of the training assessment (if third party observers).** Introduce the observers to the training center staff. Give the observers a tour of the training facilities and show them classrooms for training and lab space. The observers should make sure training space is sufficient and look for anything and everything that may impact the performance of the training.

Observers should:

- Acclimate themselves to the training space so they know where to go and so they do not interfere with training.
 - Make sure there is enough working space for everyone involved in the training assessment.
 - Make sure safety issues are identified and addressed.
 - Make sure there is proper lighting.
 - Make sure the training space has the proper audio/visual equipment.
 - Identify barriers to learning and obstructions, such as load-bearing posts or other blocked lines of sight.
2. **Observers review training material.** During the morning of day one, while the training center is preparing for training to begin, the observers, with the assistance of the Lesson Plan Evaluation Instrument, should begin reviewing hard copy versions of the training material.

How to Use the Evaluation Instruments

- There are three potential grades for each category being observed (Excellent, Satisfactory, and Needs Improvement).
- Each grade, designed as three separate columns in the instrument, has a point value.
- Each grade has a description written beneath to help the observer accurately rate the category being observed.
- Observers circle the grade under each category they feel is most accurate.
- There is space under each grade for additional comments. These comments can be utilized during the out-briefing with training center administrators and when compiling information for the final evaluation report.
- When all categories have been graded in a particular instrument, observers should add the totals in each grade column.
- At the bottom of each instrument there is a range of point totals for observers to determine if the lesson plan, lectures, or lab activities were “Excellent,” “Satisfactory,” or “Needs Improvement” overall.



3. **Observation of classroom training and lab activities begins.** Observers, utilizing the Classroom Lecture Evaluation Instrument, should begin evaluating classroom trainings on the afternoon of day one. During lab or field activities throughout the training, observers will use the Lab Activity Evaluation Instrument to evaluate. During lab or field activities, observers will evaluate safety, technical processes, adherence to OSHA standards, adherence to state codes, student expectations, and classroom-to-lab transition, among other items. These observations will continue through day two.
4. **Interviews with instructors and students.** During breaks between training or possibly during lunch of day two, the observers, utilizing the Instructor Interview Form, will interview the instructors being observed. The main purpose of these interviews is to gain insight into the instructors' perspectives on the effectiveness of the training.

Through the instructor interview process, observers should gain insight into the instructors' thoughts on perceived strengths and weaknesses of the training as well as an understanding of the instructors' comfort level with the training material.

Also during breaks or possibly during lab activities when students are available, observers will interview the students participating in the training utilizing the Student Interview Form. The main purpose of these interviews is to gain insight into the students' expectations and to learn students' perspectives on the effectiveness of the training.

Through the student interview process, observers should gain insight into whether the students felt they had sufficient time to ask questions, if they felt the training provided an environment conducive to learning, and what the students might change about the training.

5. **Observers conduct out-briefing with training center director, training lead, and instructors.** During the out-briefing observers should discuss their findings in the following areas.
 - Appropriateness of objectives for the learning group – Did the lesson plan provide objectives? Were objectives well written? Were objectives communicated properly to the class? Did students meet the objectives?
 - Organization and sequencing of content – Was content organized in a logical fashion? Were students ever confused by how the material was presented? Where was organization of content effective? Were there lead-ins to each lesson? Were there lesson summaries? Was there time for question-and-answer sessions?
 - Effectiveness of instructional methods – Were students engaged? Was the teaching method appropriate for the learning group? Was there too much lecture and not enough lab time? Was there too



much lab time and not enough lecture time? Were there learning activities during lecture (group discussions, in-class activities, etc.)?

- Quality of teaching and learning aids used – Was the instructor provided with appropriate training material? Was there an instructor’s guide? Was there a PowerPoint presentation with speaker notes and activity guides? Were there handouts? Were student manuals provided?
- Validity of assessment methods used – Were there in-class quizzes? Were questions asked at the appropriate learner level? Did assessments help students meet the learning objectives? Did the instructors grade students individually or as a group? Were grades given to students?
- Performance of students – Did students ask questions? Did students pass the training? Were students participating effectively? Did students actively participate in lab activities?

After a Training Assessment

1. **Observers provide written summary report.** The summary report should outline the strengths and weaknesses of the training center and should give recommendations for improvement. The summary should be a narrative summary of the out-briefing areas and should be based on the foundational principles of instructional systems design (ISD).

This report should be considered business confidential and should not be shared outside the training center without permission.
