1. Identify goals, principles, and constraints

Importance

The impact of mastering these competencies is that you:

- Base design on both the explicit and implicit goals of the stakeholders.
- Follow established best practices in design.
- Base design on the real needs of the various learner groups.
- Identify interdependencies and constraints early in the design process.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

1a	**Consult with stakeholders to clarify the business need and goals of the curriculum**
☐	Determine the stakeholders to involve
☐	Confirm with stakeholders the need and measures that the curriculum is intended to affect (for example, generate revenue, contain expenses, comply with government/industry/organization guidelines)
☐	Identify the impact the business need has on resources available to develop the curriculum
☐	Confirm the potential goals (for example, minimize time to competence, increase engagement, develop organization values, compete for talent, increase profile of learning function)
☐	Resolve areas of disagreement among stakeholders

1b	**Establish overall design principles**
☐	Explain the rationale for the chosen educational philosophy, design approach, and design process, for example: ‣ Activities to reinforce participants' persistence, self-esteem, and confidence ‣ Activities to build participants' confidence, leadership skills and problem-solving skills ‣ Incorporating women role models ‣ Incorporating coaching and/or mentoring ‣ Incorporating social networks and peer learning
☐	Consider any financial constraints of the program
☐	Align learning with social and cultural norms
☐	Determine security precautions for facilitators and participants
☐	Embed flexibility in the program design
☐	Consider time constraints of participants
☐	Consider participants family responsibilities

1c Profile identified groups of participants

- Profile various groups of participants (for example, participants with or without previous experience, participants hired internally or externally, different demographic groups, participants with different goals)
- Consider decision-making/agency and how to engage those family members who determine participation in your program
- Identify resources available to participants (for example, physical work environment, interactions with others, available tools, capabilities of mentors)
- Determine the desired proficiency levels of the participants once they successfully complete the curriculum (for example, "qualified to operate the machinery" or "power user")
- Identify remedial training or assistance if education levels need bolstering
- Design optional pre-program courses to bring participants' baseline skills up to acceptable levels for the program

1d Consider potential of available technology to support curriculum

- Identify potential for producing learning experiences and materials for either face-to-face or online learning using specialized authoring and audiovisual production technologies
- Determine suitable digital learning delivery methods that could reduce the need for face-to-face contact and travel and digital tools for applying a skill or knowledge from the training
  - Determine how various digital solutions would meet the needs of participants, for example, their learning preferences or access to digital tools for reference after the program
  - Evaluate whether there are barriers to overcome to deliver trainings via technology for participants (for example, not knowing how to use technology, trust in technology, etc.)
  - Determine whether the use of digital solutions would enable more participants to join the program or receive program materials (for example, scaling the delivery and multiplier effect)
  - Determine viable digital solutions for participants
  - Identify the owners of the access to technology and whether permission is needed from anyone (if so, find out from whom and what kind of permission)
  - Identify who to involve in digital support
- Identify communication channels to reach prospective participants and inform them of upcoming training
  - Use language in the marketing materials that is appropriate for the target group
  - Identify stakeholders who could promote this training
- Identify potential for electronically (or digitally) managing development workflows and providing content with enterprise learning technologies
- Identify potential for managing, personalizing, and tracking participants' learning experiences and materials with enterprise learning technologies
- Identify potential for ongoing communication and learning offered through social media
- Identify potential for distributing learning experiences and materials by internet-connected devices (for example, smartphones, tablets, laptop computers)
- Identify organizational policies on use of technology that could affect design of the curriculum

1e	Identify interdependencies and constraints
	Consider how location, geography, and number of participants affect the design
	Determine how local networks can support or reinforce performance training
	Design the program to allow participants to interact with local leaders
	Establish fees that are not too expensive to prohibit attendance or participation in activities, but are high enough to have participants take the program seriously and consider it something of value
	Consider how timing, budget, resources, and quality requirements affect the design
	Consider how continuing education, certification, or legislative requirements affect the design
	Consider how other current and anticipated organization initiatives affect the design (for example, product launches, changes to technology or regulatory requirements, role redesign)

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Summary section of the Design Document	Section describes briefly the design principles that are central to the learning approach for the curriculum
	Section summarizes the sequence of the learning experiences within the full curriculum
	List of learning experiences identifies the target audience and profile for each experience
	Section describes the required technologies for the learning experiences
	Section describes the link between each learning experience and related non-learning solutions (for example, mentoring, coaching)