4. Develop materials

Importance

The impact of mastering these competencies is that you:

- Develop learning materials that enhance the effectiveness of the learning experience and support learning objectives.
- Support consistent delivery across multiple facilitators.
- Support transfer of learning to the workplace.

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:

4a	**Write or compile content for participant and instructor materials**
▶	Follow instructional writing principles and organization guidelines
▶	Work within existing templates
▶	Write job aids and other participant materials
▶	Write text for slides, videos, and websites
▶	Write case studies and role plays
▶	Write scripts for audio and video
▶	Write facilitator guides
▶	Develop content with language, examples, and images aligned with social and cultural norms ⚧ ◎

4b	**Develop layout and visuals for participant and instructor materials**
▶	Develop or advise on visuals that are culturally appropriate to communicate content (for example, pie charts, histograms, photography or illustrations, flow charts)
▶	Develop layouts based on type of content (for example, concept, procedure, principles)
▶	Follow visual design principles
▶	Source graphics from within or outside the organization
▶	Comply with corporate branding templates and style guidelines
▶	Comply with copyright requirements

4c	**Develop storyboards**
▶	Capture all information, including text, images, interactivity, answer prompts, and activities
▶	Capture all programming and production instructions
▶	Comply with privacy, information security, and copyright requirements

DESIGNING LEARNING EXPERIENCES

1. Conduct design analysis

2. Establish learning objectives and evaluation

3. Create detailed design

4. Develop materials

5. Support implementation

4d Manage review and revision cycles with stakeholders, including subject matter experts

➡ Develop templates to facilitate input from subject matter experts

➡ Prepare for meetings with stakeholders and subject matter experts

➡ Compile input and facilitate reviews with multiple stakeholders and subject matter experts

➡ Review training content and design for contentious issues

➡ Check that learning experience complies with program guidelines regarding topics or images to avoid

➡ Get a legal review of course material, if necessary, to confirm it does not violate local laws or put the sponsoring organization in legal liability

➡ Support the resolution of differences in information and opinions

➡ Get signed approval for course from subject matter expert or designated client approver

4e Produce web-based learning

➡ Produce or manage production of audio recording

➡ Produce or manage production of video

➡ Produce or manage production of online programs

➡ Produce or manage production of websites, apps, and other digital content or tools

➡ Prototype materials for input and approval prior to full production

➡ Manage production in multiple languages

➡ Curate external materials for learning (for example, videos, blogs, online courses)

➡ Designing digitally-based learning experiences that are appropriate for participants ⚥

4f Develop materials to support the transfer of learning and sustained performance

➡ Develop performance support tools (for example, job aids, automated reminders)

➡ Develop guidance and tracking (for example, self-assessments, learning progression maps)

➡ Develop coaching materials for managers and other coaches to support participants (for example, observation checklists, validation cases, roleplays)

4g Develop materials to evaluate participants' reaction

➡ Use available technology to support evaluation of participants' reaction to the learning experience

➡ Develop materials to assess reaction (for example, feedback forms, online surveys)

4h Develop materials to evaluate the transfer of learning

➡ Determine the feasibility of using technology to support evaluation of transfer of learning, including who will pay the costs for purchasing evaluation equipment and data collection services, such as data usage on cell phones

➡ Develop materials to assess transfer of learning (for example, observation checklists)

4i	**Validate learning design and materials**
	See *Designing Curricula 3c* and the following
▶	Conduct validation and make agreed-upon changes
▶	Obtain final approval of design and materials

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
Participant materials	Participant materials conform to plan for designing and developing learning experience
	Participant materials support learning objectives
	Participant materials follow graphic design and instructional writing principles
	Participant materials are appropriate to the participant's work and regional environment
	Participant materials are accessible
Facilitator materials	Facilitator materials conform to plan for designing and developing learning experience
	Facilitator materials indicate how to support achievement of learning objectives
	Facilitator materials include how to evaluate learning objectives
	Facilitator materials follow graphic design and instructional writing principles
	Facilitator materials provide enough guidance so others who did not design the program can read the material and deliver the course in a consistent manner
	Facilitator materials are organized logically
Storyboards	Storyboards support achievement and evaluation of learning objectives
	Storyboards include all content, text, images, activities, and interactivity
	Storyboards include programming and production instructions
Management of revision and review cycles	Review cycles are planned and realistic
	Subject matter experts and stakeholders feel respected and included
	Signed approval is obtained at key stages of the design and development process
Web-based learning (for example, apps, videos, e-learning)	Learning experience conforms to detailed outline
	Learning materials follow graphic design and instructional writing principles
	Learning experience and materials are accessible
	Learning experience is written at the appropriate reading level

KEY OUTPUTS	ASSESSMENT CRITERIA
Materials to support transfer of learning	Materials support transfer of learning
	Materials clearly identify roles and responsibilities of participant and others (for example, coaches, mentors, supervisors, and peers)
	Materials can be used in the workplace without assistance
Materials to evaluate participant reaction	Evaluation is clear and easy to complete
	Evaluation captures relevant data (for example, confidence in applying new skills on the job, effectiveness of instructional methods and materials)
	Evaluation uses available technology to simplify data collection and reporting
Materials to evaluate transfer of learning	Evaluation is clear and easy to complete
	Evaluation captures relevant data (for example, uptake of new skills, proficiency in applying new skills, and barriers to transfer of learning to the workplace)
	Evaluation uses available technology to simplify data collection and reporting