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Consider this Doctoral Capstone Deliverable Guide a living document. As such, it will likely be revised and strengthened each quarter as areas for improvement are recommended or changes occur in the EdD Doctoral Capstone Project.

Comments on this document can be sent to Dr. Kevin Freer.

Thank you!

Nancy Haas, PhD
Kevin Freer, PhD
Alyce LeBlanc, PhD

The Doctoral Capstone Deliverable Guide Development Team for the School of Education
DOCTORAL CAPSTONE DELIVERABLE GUIDEBOOK

Disclaimer
Neither this document, nor any of the information and requirements contained herein, constitute a contract or create any contractual commitments between Capella University and any student, any prospective student, or any third party. The information in this document is subject to change.

Introduction
This Doctoral Capstone Guide is appropriate for the following eight School of Education Specializations:

- Adult Education
- Curriculum and Instruction
- Educational Leadership and Management
- Performance Improvement Leadership
- Personalized and Competency-Based Instruction
- Reading and Literacy
- Teacher Leader in Digital Transformation
- Teacher Leader in K-12 Studies

Differences between the Doctoral Capstone Final Report and the Deliverable

Report: The Doctoral Capstone Project Report is a scholarly paper that describes how the project was carried out, how the deliverable was developed, and how it will be used to inform practice in the local setting. The report is the “how” the project was developed and the theoretical framework and impact of the project.

The Doctoral Capstone Report is a written document using APA-style for formatting, data tables, and figures. The sections of the report are those of the proposal, but with more detail and using appropriate verb tenses that indicate that the project has been completed. The report also describes the benefits of the study to the target audience and the institution for which it was carried out. The Report Major Sections are:

- Section 1. Background
- Section 2. Process
- Section 3. Application

Learners should refer to the Final Report Template on the Campus iGuide for further details.

Deliverable: The deliverable is the research paper or professional product developed for an authentic research setting to solve a "real" problem based on the analysis of valid and reliable data. It is the “what” which was developed for the Doctoral Capstone Project.

Different doctoral capstone project types will have different deliverable outcomes.

- For the Research Paper Doctoral Capstone Project, the deliverable will be a written document (a research paper) that will convey the results, conclusions, and recommendations of whatever action research or program evaluation activity is undertaken.
For the Professional Product Doctoral Capstone Project, the deliverable will be a curriculum product or change management plan that addresses an issue at a specific setting. Follow the resources and templates for the curriculum product or change management plan in this guide.

Choosing a Deliverable

The following guiding principles will assist learners in choosing a deliverable for their Doctoral Capstone Project.

1. Examine a problematic process/issue in your organization that could be improved through the implementation of a Doctoral Capstone Project deliverable option.
2. Identify the specific evidence and/or data that serves to define the need or opportunity and the potential impact if it is not addressed.
3. Determine a potential action, intervention, or change that could be implemented to bring about improvement. Consider the linkage of the intervention to organizational goals and objectives, stakeholder interest in the intervention, cost, and visibility.
4. Review your role in your organization, and determine whether you can acquire the appropriate permission(s) to develop your deliverable to address an identified problem.
5. Identify other potential organizational barriers to implementing your intervention and conducting the study.
6. Plan and design the interventions following the appropriate guidelines in this manual.

One of the requirements of the Doctoral Capstone Project is that a real, authentic setting be selected for the development of the deliverable to solve a "real" problem. The learner should follow appropriate steps to secure permission or support from the organization to conduct the activities related to the Doctoral Capstone Project.

Data-Based Deliverable

Every project should have been identified based on data or evidence that provides the rationale for how the deliverable will address the issue that was selected. This includes the background data or evidence that were used to identify and validate that this project addresses an authentic problem in an authentic setting. A deliverable could be justified from a needs assessment, test scores, surveys, etc. Learners should collaborate with leaders or managers at the capstone site to identify a problem or situation that needs to be addressed. For example, if you decide to create a curriculum product, it should be based on data that suggests that a curriculum product would best address the identified problem. Learners must be able to justify why they chose a deliverable type in their proposal and in their final report.

Nature of the Doctoral Capstone Deliverable Guide

This guide is not intended to be a textbook for any of the deliverable types. The deliverable information and resource lists included in each deliverable section provide helpful guidance relative to deliverable type, and are not intended to be exhaustive or all-inclusive. Learners must engage in significant research for additional resources and literature.

This guide contains a separate section for each deliverable type. Each deliverable section includes a description of the deliverable, resources, journal articles, websites, and for most of them, a suggested template to support development of the deliverable.
General Deliverable Guidelines
Learners should follow the five guidelines below to make certain that their Doctoral Capstone Projects are in alignment with established policies.

Guideline 1: Clear Category and Type
The Deliverable for each Doctoral Capstone Project must fit clearly and unambiguously into one and only one category (Research Paper or Professional Product) and then fit one and only one deliverable type (Action Research Monograph, Evaluation, Curriculum, or Change Management Plan).

Guideline 2: Standalone Document
The Deliverable must be a separate document from the Final Report. The Deliverable is to be a standalone paper or product that is created for a specific target audience at the site for which the Deliverable is created.

Guideline 3: Professionalism
The Deliverable must be professional. Its design (e.g. font, layout, graphics) and tone should fit the professional or institutional audience for which it is intended.

Guideline 4: Design Models
The Deliverable must follow a design model appropriate to the deliverable type.

Choosing a Deliverable
The following guidelines will assist you in choosing a deliverable for your Doctoral Capstone Project.

1. Examine a problematic process/issue in your organization that could be improved through the implementation of a planned intervention.
2. Identify the specific evidence and/or data that serve to define the need or opportunity and the potential impact if it is not addressed.
3. Determine a potential action, intervention, or change that could be implemented to bring about improvement. Consider the life cycle of the intervention, the linkage of the intervention to organizational goals and objectives, stakeholder interest in the intervention, cost, and visibility.
4. Review your role in your organization and determine whether you can acquire the appropriate permission(s) to develop your deliverable to address an identified problem.
5. Identify other potential organizational barriers to implementing your intervention and conducting the study.
6. Plan and design the interventions following the appropriate guidelines in this manual.
ACTION RESEARCH MONOGRAPH

Introduction

This document serves as a guide for learners who choose the Action Research Monograph as their capstone deliverable. The contents provide information about getting started with an action research project, along with suggested books, articles, and links to action research resources. In addition, an annotated template is included and its use is suggested to guide both the design and presentation of an action research study. This Action Research Monograph Guide works in conjunction with other Doctor of Education (EdD) Capstone Project documents located on iGuide. Learners are encouraged to review these documents with their mentors to fully understand the requirements of both the selected Capstone Deliverable and the Capstone Report.

This guide includes information applicable to learners in all EdD specializations. However, specializations may have additional guidelines that must be followed and/or suggested resources that are specific to a particular specialization. In addition, learners should consult with their specialization faculty early in the decision-making process regarding any specialization-specific instructions and requirements for the action research capstone project.

The remainder of this document is organized as follows:

- Action Research Monograph Deliverable: Description of the Action Research Monograph deliverable type
- Getting Started: A basic overview of the general action research planning process
- Purpose: Explanation of the purpose of the deliverable
- Action Research Resources: Selected references and resources about action research methods, including appreciative inquiry, action science, and action learning
- Suggested Template: An annotated template to guide the development of the monograph

What is an Action Research Monograph?

The Action Research Monograph is one of two deliverable types under the Capstone Project research paper category. Learners who wish to complete an action research monograph as their deliverable will first design and implement an action research study. An action research study combines action and research to address a problem or opportunity in a local setting. The action is in the form of an intervention undertaken to improve a process, problem, or situation. Learners review theory and best practices in the literature as well as local data and evidence to support the identification and description of the problem or opportunity which then informs the action to be taken. The research literature reviewed also provides a basis for comparison of the study’s outcomes with previous research. The monograph is a comprehensive presentation of an action research study conducted by the learner.

Purpose

The purpose of the action research deliverable is to demonstrate the learner’s ability to appropriately conduct action research; to situate the findings and new knowledge within existing knowledge and best practice literature; and to distill and communicate the study’s context, problem or opportunity, rationale, methods, implementation, findings, and implications for professional practice to a particular audience. The degree to which each of these components is presented and discussed may vary depending on the intended audience and the purpose of the research itself.
The Action Learning, Action Research Association (ALARA) states in its description of its Action Research Monograph Series that “…studies will contribute to theoretical and practical understanding of action research and action learning in applied settings.” The EdD Action Research Capstone is consistent with the ALARA statement.

The capstone action research monograph will, therefore, provide:

- evidence of a well-defined problem or opportunity for improvement, supported by data and evidence, and informed by current literature;
- actions/interventions undertaken to improve the situation (supported by existing data and/or literature);
- appropriate data collection and analysis;
- discussion of the limitations of the research, as implemented;
- reflection and discussion of results in relation to existing knowledge and literature about the local problem and broader topic;
- well-supported conclusions and implications for future practice, both at the local research site and in terms of broader implications for other organizations with similar problems; and
- recommendations for further research.

Getting Started

The table below provides a basic overview of the general planning process for an action research study. However, this guide is not intended to be an action research manual or handbook. As part of the preparation for designing and implementing an action research study, learners are expected to gain an understanding of action research methods and approaches by conducting an independent review of action research literature. The Action Research Paradigm Protocol (ARPP) contains detailed, step-by-step explanations of the inquiry cycle and elements of an action research study. In addition, the resources listed in this guide are a rich source of information and guidance.

Learners are also expected to be well informed about the problem or opportunity the study will address, as well as the action or intervention that will be implemented. Therefore, ongoing review of literature related to the selected topic and intervention is an important element of the planning process from the very beginning.

Once again, this guide is intended as a general resource that is applicable to all specializations. Learners should check the appendices and consult with their mentors for any additional requirements and/or resources that apply specifically to their specializations.

Table 1
Basic overview of the basic action research planning process

<table>
<thead>
<tr>
<th>Action</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td>Examine a problematic process/issue in your organization that could be improved through the implementation of planned intervention. Alternatively, identify an opportunity for continuous improvement.</td>
<td>Review the literature to develop deeper understanding of the organizational issue or opportunity being considered for an action research study. Begin ongoing review of action research literature. Consult the Action Research Paradigm Protocol (ARPP).</td>
</tr>
<tr>
<td>Identify the specific evidence and/or data</td>
<td>Evidence, examples, and data allow the</td>
</tr>
<tr>
<td>Action</td>
<td>Comments</td>
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<tr>
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</tr>
<tr>
<td>that serve to define the problem or opportunity and the potential impact if it is not addressed.</td>
<td>organizational issue to be more precisely defined. If little or no factual evidence or data can be found to support the existence of a significant issue or opportunity, seek a different organizational issue to explore. Continue review of the literature on action research methods. Consult the ARPP.</td>
</tr>
<tr>
<td>Determine a potential action, intervention, or change that could be implemented to bring about improvement.</td>
<td>Review the literature to learn how other organizations have addressed the issue, and which actions or interventions have been shown to be most effective. Discuss potential actions/interventions with others in the organization to gather additional ideas and feedback, including those who are most affected by the issue you plan to address. Continue review of the literature on action research methods. Consult the ARPP.</td>
</tr>
<tr>
<td>Determine feasibility of implementing the intervention and conducting an Action Research study. Review your role in your organization and determine whether you can acquire the appropriate permission(s) to conduct an Action Research study at your site. You must have the authority to implement the intervention in order to conduct the study. Identify other potential organizational barriers to implementing your intervention and conducting the study.</td>
<td>Review the literature related to conducting research in your own organization. Discuss the potential project with your supervisor and those with authority to grant permission for the study to determine feasibility. Discuss possible ways to address organizational barriers. Continue review of the literature on action research methods. Consult the ARPP.</td>
</tr>
<tr>
<td>Plan and design the action research study following the appropriate milestone instructions.</td>
<td>Continue review of the literature on action research methods. Consult the ARPP. Review literature about ethical considerations when conducting research.</td>
</tr>
</tbody>
</table>

**ACTION RESEARCH MONOGRAPH DELIVERABLE TEMPLATE**

The action research monograph is comprised of the sequence of components listed below. Guidelines with explanatory details for each of the components follow.

While the exact content of the monograph may vary depending on the nature of the research and the intended audience, the guidelines provide detailed descriptions of the components to be included in the capstone monograph.

- Title Page
- Abstract
• Table of Contents
• Introduction
• Phase 1: Planning
• Phase 2: Implementation and Data Collection/Analysis
• Phase 3: Evaluation of Outcomes
• Conclusion

Title Page
Use the same format and content for the title page provided in the EdD Capstone Template. For information on how to develop an appropriate title for the monograph, refer to the *APA Publication Manual*, 6th edition guidelines (section 2.01). Foremost among these is the need for the title to serve as a standalone, informative statement of the main focus of the study, and to include a maximum of 12 words. Consult the Manual for helpful do’s and don’ts. It is acceptable, but not necessary, to use this format:

(Title): An Action Research Study.

For example: Improving High School Teacher Performance Through Peer Coaching: An Action Research Study

Abstract
An abstract is a short summary of the study using neutral, factual language. It should be concise and include the setting and local problem, intervention, findings, and implications. The target length of the abstract is 350 words or less, formatted in one double-spaced paragraph (do not create a justified right margin). Guidelines for development of the abstract can be found in section 2.04 of the *APA Publication Manual*, 6th edition. Note that the Abstract page has no page number and "Abstract” does not appear in the Table of Contents.

Table of Contents
The monograph’s table of contents will follow the sequence listed below, but the headings will reflect the specifics of each study and include sub-headings, as appropriate.

Note: The title page and abstract are components of the monograph, but are not included in the table of contents.

Introduction
The introduction provides a brief background about the study, including the
• purpose of the monograph;
• learner’s role in the organization and role in the research; and
• organization of the paper.

Phase 1: Planning
This section of the monograph provides the necessary detailed information about the planning phase of the action research study. (Refer also to the transcript of the ARPP when writing this section.)

A. Problem or Opportunity
The purpose of this section is to provide the audience with a clear understanding of the local problem/opportunity that the action research was designed to address. The description should be complete but tailored to be precise and concise. Include data and evidence that will illuminate the depth and breadth of the problem or opportunity. Eliminate unnecessary details.

The following components should be included to the extent necessary for the intended audience to gain an understanding of the problem/opportunity and its local context:

- the issue, opportunity, or problem addressed by the action research study in a specific statement of the problem;
- the literature consulted to help define the problem or opportunity;
- data that support identification and definition of the problem or opportunity;
- the organizational context of the problem.
- a description of how the problem/opportunity manifests itself at the local research site; and
- details about the organization’s resources, culture, leadership, economic, regulatory, or political circumstances, or other contextual factors that are pertinent to the situation at the local site.

B. Intervention

Provide an overview of the intervention. The overview should allow the reader to grasp the range of actions undertaken and/or changes to processes, as well as the key phases or stages of the intervention. A model, table, flowchart, calendar, or other visual may offer a way to convey the information concisely and accurately. Include:

- a description of the participants;
- the actions and activities to be implemented; and
- a discussion of literature sources that support the choice of intervention.

C. Action Research Methods

In this section, provide an overview of the action research design for the study. Include the action research questions, data sources, and a summary of the data collection methods. In addition, briefly discuss or explain:

- how the research questions were developed;
- how the data collected align to the research questions; a chart showing how data collected are aligned to each research question is an effective way to communicate the relationship between research questions and data collection;
- the success criteria or expected outcomes;
- how the success criteria were evaluated (measure of success); and
- ethical issues or conflicts of interest that were identified and how they were addressed.

**Phase 2: Implementation and Data Collection and Analysis**

Phase 2 focuses on the actual implementation process and what happened as the intervention was put into action. Two consecutive sections are described below. However, depending on the context of the study and implementation plan, the process analysis and
analysis of data sources may be organized and presented to maximize logic and flow of Phase 2.

A. Process Analysis

This is the “story” of the implementation of the intervention. According to the ARPP transcript, “Documentation of how the implementation process unfolds on a day-to-day basis is essential to understanding, and clearly communicating to others, ‘what happened’ during the study.” The description and analysis of what actually happens during the implementation, and the documentation of any departures from what was planned or expected, comprises the process analysis. Evidence and data sources for this narrative and analysis should be provided (and may include the researcher’s journal). The following questions help guide this section:

• How was the implementation monitored and documented?
• What happened as the implementation unfolded? Was the intervention implemented according to schedule? How did participants react?
• What types of conversations occurred among participants and action researchers in relation to the implementation of the intervention?
• Were there any surprises or unanticipated difficulties? If so, describe them.
• Were changes to the original research plan necessary? If so, describe them.
• What assumptions were made about the implementation and the outcomes that may have been challenged by actual events?
• How were the implementation, including communications and data collection, carried out in a way that was respectful of participants?
• How were participants and members of the organization provided updates or information about the progress of the study?
• How were opportunities provided for member checking? If not, was the omission intentional?
• How were the findings debriefed among participants?
• How was the plan implemented according to the highest ethical and scholarly standards?

B. Data Sources: Collection Procedures and Analysis

In this section,

• provide a description of how each data source (as identified in the plan in Phase 1) was collected;
• describe the data analysis process; and
• provide an analysis of each data source.

Phase 3: Evaluation of Outcomes

A. Conclusions

Now that both a process analysis and an analysis of each data source have been completed, discuss results and outcomes. Baseline data about the problem or issue, specific criteria against which to judge success of the intervention, and metrics that help evaluate whether the criteria were met were established in the action plan prior to implementation.
• Summarize study results and compare with the baseline data and the criteria for success. Whether the results of the data analysis are quantitative or qualitative, it should be possible to offer compelling evidence of the extent to which the implementation of the change did or did not make a difference, and whether the difference was positive or negative.

• Discuss the implementation process and evaluate the extent to which the original plan was followed and whether modifications were necessary. Unanticipated events, unexpected consequences, participant reactions, and other aspects of the implementation process should be discussed.

B. Reflections and Critique

Discuss your reflections and critique of the study’s design, implementation, and findings, citing evidence from the study (and the literature where appropriate). Discuss and interpret the findings. Use these guiding questions, adapted from the ARPP transcript, to shape the discussion.

• What unexpected elements or outcomes were identified? What went wrong?
• Would a different action or intervention have had better results? Explain.
• What modifications to the study could or should have been made?
• What might be done differently if the study were to be repeated?

The results of an action research study may suggest a need for further action, for a different type of action, or for no action at all. Briefly explain what can be concluded about what needs to happen next.

• Based on the reflection cycle (individually and collaboratively) what are the implications for next steps?
• How does the next action reflect the previous learning?

C. Implications for Professional Practice

This section includes a well-crafted analysis of ways the study might alter, impact, or lead to change at the local research site. The discussion should be supported by specific study findings and compared with research in the literature. Each aspect of the study should undergo thorough review.

D. Recommendations

Improvement is a continuous process. Based on the study’s findings and the discussion of implications for professional practice, provide at least one recommended cycle of action research for future implementation. Provide support from the literature and include a comparison of advantages and disadvantages for implementation at the local site.

Conclusion

Provide a concluding section that briefly recaps the study’s problem or opportunity, the intervention that was implemented to address it, and what was learned as a result of the study. The conclusion should be a short, concise summary of key findings or “take-aways.” The purpose is to provide the most impactful conclusions such that the reader could refer to this section for the study’s main findings and implications for professional practice.

Action Research Resources

What follows is a selection of online and hardcopy literature and resources about action research and related approaches including appreciative inquiry, action learning, and action science. Older resources represent seminal works or the most recent editions of significant
resources. The latest editions of texts appear here, but earlier editions may be useful as well. The journals and journal articles listed can be found in the Capella Library. In addition, many of the books are available through the Capella Library as e-books.

The list is not exhaustive! Note that many more resources are available in the Capella Library. To find additional resources, conduct a search of the Capella Library resources, or schedule an appointment with a Library Specialist.

**Books and Journal Articles**


**Journals (available at the Capella Library)**


**Journal (available online)**

*i.e.: Inquiry in Education*: Online, peer reviewed journal

**Websites**

The following websites host comprehensive information and links to many additional resources:

- *Action Learning, Action Research Association (ALARA)*
- *Action Research Paradigm Protocol (ARPP)*
- *Action Research Resources*
- *American Educational Research Association*
- *Special Interest Group (SIG) Action Research*
- *Association for Supervision and Curriculum Development*
- *Center for Collaborative Action Research*
- *Center for Practitioner Research: Improving Education and Learning*

**Appreciative Inquiry**


Action Learning

Books and Journal Articles


Action Learning Journal (Online)

Action Learning: Research and Practice
According to the website, the journal "is the first international journal dedicated to the advancement of knowledge and practice through action learning.

**Action Learning Websites**
- Free Management Library: All About Action Learning
- World Institute for Action Learning

**Action Science**
PROGRAM EVALUATION

Conducting a Doctoral Capstone Evaluation Study is one of the options that you may choose to complete your Education Doctorate. You may be at the stage where you are investigating each of the Capstone Options to help you make a decision about which one your will pursue. Or, you may have already chosen to conduct an Evaluation Study as the culminating scholarly demonstration of your doctoral program.

The purpose of this document is to provide resources for conducting an Evaluation Study (ES). It is not the definitive resource for everything the reader should know and be able to do to conduct an ES – it is only a guide with, as expected, “guidelines.” Extensive work outside this guide will be necessary to complete a Capella Doctoral Capstone. This guide provides references to resources to assist the learner to get started with an ES.

“Evaluation is about measuring the efficiency and effectiveness of what you did, how you did it, and the degree to which the solution produced the desired results” (Hale, 2007, p. 14). An evaluation explains how you worked with stakeholders to design, develop, implement and communicate results of a program improvement intervention.

Background

What is Program Evaluation?

Program evaluation is the sequential or systematic assessment of the processes and/or outcomes of a program with the intent of furthering its development and seeking to identify areas that need to be improved. As such, it is typically a collaborative process in which evaluators work closely with program staff to craft and implement an evaluation design that is responsive to the needs of the program. For example, during program implementation, evaluators can provide formative evaluation findings so that program staff can make immediate, data-based decisions about program implementation and delivery. In addition, evaluators can, towards the end of a program or upon its completion, provide cumulative and summative evaluation findings, often required by funding agencies and used to make decisions about program continuation or expansion.

How is evaluation different than research?

Evaluators use many of the same qualitative and quantitative methodologies used by researchers in other fields. Indeed, program evaluations are as rigorous and systematic in collecting data as traditional social research. That being said, the primary purpose of evaluation is to provide timely and constructive information for decision-making about particular programs, not to advance more wide-ranging knowledge or theory. Accordingly, evaluation is typically more client-focused than traditional research, in that evaluators work closely with program staff to create and carry-out an evaluation plan that attend to the particular needs of their program.

How is evaluation different than assessment?

The primary difference between evaluation and assessment lies in the focus of examination. Whereas evaluation serves to facilitate a program's development, implementation, and improvement by examining its processes and/or outcomes, the purpose of an assessment is to determine individuals or group's performances by measuring their skill level on a variable of interest (e.g., reading comprehension, math, or social skills, to mention just a few). In line with this distinction—and quite common in evaluating educational programs where the intended outcome is often some specified level of academic achievement—assessment data may be used in determining program impact and success.

Competent practitioners help stakeholders measure the impact of solutions.

Evaluators:
• help the stakeholders select the appropriate measures.
• develop a measurement strategy that includes ways to:
  o leverage data already being collected
  o collect data
  o analyze the data
  o summarize and report data
• help develop measurement tools and methods
• explain the implications of the data
• facilitate discussions on what the data mean and how to best use the data.

so stakeholders:
• understand the results they received from implementing the solutions
• recognize what else needs to be done to sustain the results
• support the changes necessary to sustain results (International Society for Performance Improvement, CPT Standards, n.d).

How to Use These Resources
The resources in this document are provided to assist learners in finding relevant literature resources for evaluation studies. Learners are encouraged to review these resources with their mentors and identify additional readings from the literature to support the writing of both the Research Paper and Report (deliverable) required for the Capstone assignment.

This resource is organized in the following sections:
• Getting Started: Actions and resources to begin planning an evaluation study
• Special Notes on ROI Studies: Information on ROI Certification requirements for Performance Improvement Specialization learners only
• Evaluation and Related Models & Frameworks: A compilation of primary references used to select evaluation models and frameworks
• Additional References: General references on evaluation studies
• Websites: Resources available from professional organizations and consultants.
• Additional Resources: Downloadable samples of professional evaluation reports and other useful resources

Getting Started
Work with your mentor to get started on the evaluation study. Follow these general steps while planning to design, develop, and implement your evaluation study. Refer to Additional Resources for each item in this table from the listings below.

<table>
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<th>Actions</th>
<th>Resources</th>
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</thead>
<tbody>
<tr>
<td>Ghere, G., King, J.A., Stevahn, L., &amp; Minnema,</td>
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<td>Identify an appropriate evaluation model and/or framework to use in your study.</td>
<td>Refer to the references listed in this document.</td>
</tr>
<tr>
<td>Read a variety of sample evaluation reports to have an idea of what the deliverable will be for your study.</td>
<td>Refer to the sample evaluation reports included in this document. Review additional evaluation studies found in the Capella Library.</td>
</tr>
</tbody>
</table>
**Actions** | **Resources**
--- | ---

**ISPI Performance Technology Standards**

---

**Evaluation and Related Models & Frameworks**

Refer to these references to identify an appropriate evaluation model and/or framework to use in your study. Work closely with your mentor throughout this process.

| Models & Frameworks | References |
--- | ---
<table>
<thead>
<tr>
<th>Model</th>
<th>Reference</th>
</tr>
</thead>
</table>
Additional References

Use these additional references during your review of literature on topics related to your evaluation study.

American Journal of Evaluation http://aje.sagepub.com.library.capella.edu/


ROI Institute. [Case study texts from a wide variety of organizational contexts and topics] (http://www.roinstitute.net/)


Websites
Locate additional information on accreditation standards, certifications, publications and related resources at these websites.

- American Evaluation Association (AEA)
- Association for Talent Development (ATD)
- International Society for Performance Improvement (ISPI)
- Kirkpatrick Partners
- ROI Institute

You may find it helpful to conduct an internet and library search based on these key terms:

- evaluation research examples
- types of evaluation research
- evaluation research design
- descriptive research
- program evaluation
- purpose of evaluation research
- evaluation research definition
- evaluation research paper

Sample Evaluation Reports
Read a variety of sample evaluation reports to have an idea of what the deliverable will be for your study. Refer to the specific information resources related to ROI studies.

- Evaluation Report Template, USAID Learning Lab
- Evaluation Workbook, Center for Disease Control
- How to Write an Evaluation Plan and Report, Corporation for National, and Community Service
- ROI Certification Components, Scoring Matrix, ROI Institute

Alternative A: Template

I. Cover Page and Title
II. Executive summary
III. Table of Contents
   - Use major headings below. Executive summary is not in the table of contents.

IV. Background and Context
   - Purpose of evaluation
   - Evaluation questions
   - Target audience of the report
   - Overview of the project and its goals
   - Key stakeholders
   - Program Status (Date created? New/Established/Ending? Funded?)

V. Evaluation Methods
   - Steps in Program evaluation model
   - Resources/inputs (people/documents/data/etc.)
   - Data collection process (Place instruments in an appendix)
   - Data analysis

VI. Evaluation Results
   - Introduction to results – brief summary
   - Results reported by evaluation question
   - Graphs and Charts as appropriate (observe APA formatting)

VII. Findings/Recommendations/Conclusions/Impact
   - Report by evaluation question
   - Conclusions
   - Impact

Alternative B: Suggested Evaluation Report Outline for Learners in PIL

Executive Summary

Introduction

Program/Process to be Evaluated

Need
Context
Target Population
Stage of Development
Resources/Activities
Inputs
Outputs
Outcomes

**Evaluation Purpose**
Key Audience(s)/Stakeholders
Evaluation Questions
Project Background
Stakeholder Needs
Logic Model

**Evaluation Design and Methods**
Evaluation Design
Data Collection Methods
Data Collection Management & Timeline

**Data Interpretation**
Indicators and Standards
Analysis
Data Analysis Management & Timeline
Interpretation

**Limitations**

**Findings, Conclusions and Recommendation**

**Communications and Presentation**
Communications
Communicating and Reporting Management

**References**

**Appendix**

**Special Notes on ROI Studies**
Review the following [ROI Institute](#) documents for further details on ROI certification requirements.

- Certification in the Return On Investment Methodology
- Certified ROI Practitioner Roles
- ROI Certification Competency Matrix
- ROI Certification Criteria
Suggested ROI Impact Report for Performance Improvement Leadership Specialization

Executive Summary

Introduction

Background

Business/Performance Opportunity

Performance Improvement Need/Opportunity

Target Audience

Objectives

Job Performance

Business Results

The Program

The xxxxxxxxx Program

The Need for a Comprehensive Evaluation

Cost of the Program

The Evaluation Approach

A Balanced Set of Measures

The ROI Methodology

Standards and Philosophy Guiding the ROI Methodology

The Results

Level 1: Participant Reaction, Satisfaction, and Planned Action

Level 2: Learning

Level 3: Application and Implementation (Transfer of Learning)

Level 4: Impact

Level 5: ROI

Intangible Benefits

Conclusions

Next Steps

Appendix
CHANGE MANAGEMENT PLAN

Developing a Doctoral Capstone Change Management Plan is one of the options that you may choose to complete your Education Doctorate. You may be at the stage where you are investigating each of the four Capstone options to help you make a decision about which one you will pursue. Or, you may have already chosen to complete a Change Management Plan as the culminating scholarly demonstration of your doctoral program.

The purpose of this document is to provide resources for developing a Change Management Plan (CMP). It is not the definitive resource for everything the reader should know and be able to do to create a CMP – it is only a guide with, as expected, “guidelines.” Extensive work outside this guide will be necessary to complete a Capella Doctoral Capstone. This guide provides references to resources to assist the learner to get started with the CMP.

Note: learners are not asked to implement these plans.

Background

Change management “involves problem solving in a concerted effort to adapt to changing organizational needs” (Van Tiem, Moseley, & Dessinger, 2012, p. 624). Change management planning must be integrated and supported by the entire performance improvement process. This requires knowledge of competencies associated with the role of change manager, approaches for managing change, and how to develop a proposal to secure approval and support of a change management plan. Knowledge of the issues and dimensions that result in successful change are also essential for those leading and managing change.

A change management plan includes a set of procedures, materials, and organizational actions designed to bring about change in the process whereby an organization meets its objectives.

A change management plan should be designed to:

• demonstrate reasons for the change;
• define the type and scope of change;
• explain the particulars of the change;
• outline the implementation strategies;
• specify change management monitoring requirements;
• create a communications plan.

How to Use These Resources

The resources in this document are provided to assist learners in finding relevant literature resources for change management planning. Learners are encouraged to review these resources with their mentors and identify additional readings from the literature to support the writing of both the Doctoral Capstone Final Report and the Deliverable. The Change Management Plan does not have to be implemented.

Contents

This resource is organized in the following sections:

• Getting Started: Actions and resources to begin developing a change management plan
• Change management Related Models & Frameworks: A compilation of primary references used to select change management models and frameworks
- Additional References: General references on change management
- Websites: Resources available from professional organizations and consultants
- Additional Resources: Downloadable samples of professional change management reports and other useful resources

**Getting Started**

Learners should work with their mentor to get started on the change management planning process. Follow these general steps while planning to design, develop, the change management Capstone project. Refer to Additional Resources for each item in this table from the listings below.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify an appropriate change management model and/or framework to use in your study.</td>
<td>Refer to the references for models and frameworks listed in this document.</td>
</tr>
<tr>
<td>Read a variety of sample change management reports to have an idea of what the deliverable will be for your study.</td>
<td>Refer to Additional Resources and Sample Change Management Reports &amp; Templates. Review additional change management plans found in the Capella Library and internet.</td>
</tr>
<tr>
<td>Ensure that you will be prepared</td>
<td>Refer to your specialization’s professional association</td>
</tr>
</tbody>
</table>
to abide by a Code of Conduct & Ethics while planning a change management strategy.

for further guidance on a Code of Conduct & Ethics.

Association of Change Management Professionals
http://www.acmpglobal.org/?page=CodeEthics

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**Change Management Models & Frameworks**

Refer to these references to identify an appropriate change management model and/or framework to use in your study. Work closely with your mentor throughout this process.

<table>
<thead>
<tr>
<th>Models &amp; Frameworks</th>
<th>References</th>
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<tbody>
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<td>Models &amp; Frameworks</td>
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<tr>
<td>Models &amp; Frameworks</td>
<td>References</td>
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</tr>
</tbody>
</table>

**Additional References**

Use these additional references during your review of literature on topics related to your evaluation study.


*Journal of Change Management*

*Journal of Organizational Change Management*

*Performance Improvement Journal*

*Performance Improvement Quarterly*

**Websites**

Locate additional information on accreditation standards, certifications, publications and related resources at these websites.

- [American Management Association (AMA)](https://www.ama-usa.org)
- [Association for Talent Development (ATD)](https://www.atd.org)
- [Change Management Institute](https://www.changetechniques.com)
- [Change Management Models – A Comparison](https://www.changemanagementmodels.com)
- [Office of Chief Information Officer, Washington State](https://www.ocio.wa.gov)
- [International Society for Performance Improvement (ISPI)](https://www.ispi.org)
- [Project Management Docs](https://www.projectmanagementdocs.com)
- [Project Management Institute](https://www.projectmanagement.org)
- [Prosci](https://www.prosci.com)

You may find it helpful to conduct an internet and library search based on these key terms:

- change management plan example
- change management process
- change management plan template
• organizational change management plan
• change management models
• project change management plan
• organizational change management plan template
• change management plan definition.

Sample Change Management Reports
Read a variety of sample change management reports to have an idea of what the deliverable will be for your study.
• Change Management Preparation Workbook, Association of Corporate Counsel
• Change Management Workbook and Toolkit, Queensland Government Information Office
• Dale Carnegie Change Management, Dale Carnegie
• CDC Change Management Plan Template, Center for Disease Control
• Prosci Organizational Change Management Planning Checklist, Prosci.com
• Project Planning Templates, Project Management Docs

Sample Change Management Templates

Executive Summary

Introduction

Background
Type of Change
Organizational Context
Performance Analysis: Needs Assessment
Change Management Purpose
Key Audience(s)/ Stakeholders
Organization Change Readiness

Change Management Design and Methods
Change Management Design
Guiding/Research Guiding Questions to guide and evaluate the change
Project Constraints
Process Change
People Change
Information Sharing
Cost of Change
Risk Assessment
Change Management & Timeline

**Implementation Strategies**

- Action Plan
- Communication Plan
- Business Systems Plan
- Training Plan
- Resistance Plan

Roles & Responsibilities of Change Management Team

**Change Management Monitoring**

- Change Management Request Process Requirements
- Change Request Form and Change Management Log
- Evaluating and Authorizing Change Requests
- Change Control Board

**Findings, Conclusions and Recommendation**

**Communications and Presentation**

- Communications
- Communicating and Reporting Management

**References**

**Appendix**
CURRICULUM PRODUCT

Introduction

This section of the guide provides information about getting started with a curriculum product, along with suggested books, articles, and links to Curriculum Product resources. Because of the diversity of the curriculum products, rather than propose a template for each of the curriculum products, the elements of the curriculum products will be described.

The curriculum deliverable product is one of two deliverable types under the Capstone Project professional product category. Learners who plan to develop a curriculum product must first have reviewed data to determine that a curriculum product is the most appropriate solution to the problem or situation.

The remainder of this document is organized as follows:

- Curriculum Product Options: Description of the Curriculum Product types
- Scope of Product: Guidelines for how big in scope the project should be
- Purpose: Explanation of the purpose of the deliverable
- Getting Started: A basic overview of the general curriculum product planning process
- Suggested Elements: A list of elements to guide the development of the curriculum products
- Curriculum Product Resources: Selected references and resources about curriculum products

Curriculum Product Options

The following section is provided for the following curriculum product options:

- Curriculum Development
- Course Development
- Professional Development

Learners must have permission of their mentor to develop an alternative curriculum product other than a curriculum, a course or professional development. Learners should submit a rationale to develop an alternative curriculum product. Mentors should confirm with the Specialization Chair to confirm approval to develop an alternative curriculum product.

Scope of the Product

The scope of the project should address a problem beyond the building level and be of consequence for a district or for a larger scope than the immediate local surroundings. For example, the learners must demonstrate that the problem can be addressed district-wide in addition to at their own school or setting. The curriculum product should be carefully justified from data such as test scores or needs assessment data and it should be doctoral level work compared with master’s level capstone work. The doctoral level capstone is more comprehensive and robust in form and substance that the master’s level product. For example:

- A master’s level curriculum product may address a narrow audience such as a grade level or department while a doctoral level product should involve a wider audience such as a district or larger audience.
- A curriculum product at the doctoral level should be built on a theoretical framework with literature to support the project appropriate to the product being developed.
• At the master’s level, a resource manual or guide might be an appropriate project but at the doctoral level, the resource manual must be accompanied by professional development.

For example, if the learner has data that indicates that the district or organization would benefit from having a mentoring program and a mentoring manual, the manual must be accompanied by professional development training on mentoring. A resource guide alone would not be sufficient.

A doctoral level curriculum product should expand on existing products or fill a gap or create a new curriculum product. Learners should reconsider creating a product for which there are many options on the market from which they can choose. If the learner proposes to create something for which there are market-available options, the learner should be prepared to justify why creating another similar product is a reasonable decision.

Many organizations are changing instructional delivery systems from print to online delivery. Significant enhancements and changes must be made to the print version to qualify as being rigorous enough to be considered doctoral level work.

Learners should work closely with their mentor to discuss the scope of the curriculum product.

**Purpose of the Curriculum Product**

The purpose of the curriculum product deliverable is to demonstrate the learner’s ability to

- appropriately identify a data-based problem;
- align the curriculum product solution to the identified problem;
- access existing knowledge and best practice literature to develop the product; and
- develop a curriculum product that could be implemented to address the problem.

The critical attribute of a curriculum product is to have a complete, standalone product that contains all the elements of the product so that it any knowledgeable person could implement the deliverable.

The Doctoral Capstone Curriculum Product will provide:

- evidence of a well-defined problem or opportunity for improvement, supported by data and evidence, and informed by current literature;
- actions/interventions undertaken to improve the situation (supported by existing data and/or literature);
- a completed product in a final form, ready to implement; and
- a plan for how the curriculum product could be evaluated to determine if it met the outcomes.

**Getting Started**

The table below provides a basic overview of the general planning process for a curriculum product. However, as with the other deliverables, this guide is not intended to be a curriculum product manual or handbook. As part of the preparation for designing and implementing a curriculum product, learners are expected to gain an understanding of developing curriculum products by conducting an independent review of the literature.

Learners are expected to be well informed about the problem or opportunity the product will address, as well as the action or intervention that will be implemented. Therefore, ongoing review of literature related to the selected topic and intervention is an important element of
the planning process from the very beginning. It will be necessary for the learner to provide a theoretical framework and literature review for their Final Report.

Once again, this guide is intended as a general resource that is applicable to all specializations where the curriculum product is approved. Learners should consult with their mentors for any additional requirements and/or resources that apply specifically to their specializations.

Basic overview of the curriculum product planning process

<table>
<thead>
<tr>
<th>Action</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examine a problematic process/issue in your organization that could be improved through the implementation of planned intervention. Alternatively, identify an opportunity for continuous improvement.</td>
<td>Review the literature to develop a deeper understanding of the organizational issue or opportunity being considered for a curriculum product.</td>
</tr>
<tr>
<td>Identify the specific evidence and/or data that serves to define the problem or opportunity and the potential impact if it is not addressed.</td>
<td>Evidence, examples, and data allow the organizational issue to be more precisely defined. If little or no factual evidence or data can be found to support the existence of a significant issue or opportunity, seek a different organizational issue to explore. Continue review of the literature curriculum product development.</td>
</tr>
<tr>
<td>Determine a potential action, intervention, or change that could be implemented to bring about improvement.</td>
<td>Review the literature to learn how other organizations have addressed the issue, and which actions or interventions have been shown to be most effective. Discuss potential actions/interventions with others in the organization to gather additional ideas and feedback, including those who are most affected by the issue you plan to address.</td>
</tr>
<tr>
<td>Determine feasibility of implementing the curriculum product</td>
<td>Review the literature related to conducting research in your own organization. Discuss the potential project with your supervisor and those with authority to grant permission for the study to determine feasibility. Discuss possible ways to address organizational barriers.</td>
</tr>
<tr>
<td>Review your role in your organization and determine whether you can acquire the appropriate permission(s) to implement the curriculum product you are proposing at your site. You must have the authority to implement the intervention.</td>
<td></td>
</tr>
<tr>
<td>Identify other potential organizational barriers to implementing your intervention and completing your deliverable</td>
<td></td>
</tr>
<tr>
<td>Plan and design the deliverable following a recognized design model.</td>
<td>Read this section of the deliverable guide and follow design steps suggested by the</td>
</tr>
</tbody>
</table>
Research/Development Guiding Questions

For each curriculum product, the learner should develop questions that guide the development of their product. The questions that guide the development product are similar to questions that might be developed for a Program Evaluation. For example, for professional development, the learner might ask the following question: “What evidence adequately measures a teacher’s engagement strategies to increase learning in high school social studies classes?”

DEVELOPING A CURRICULUM

Introduction

Curriculum Development is a large task. Curriculum is defined as planned, purposeful, progressive, and systematic process to create positive improvements in what and how students learn. A curriculum could be created or modified at the district or state level or even on a larger scope such as the case with the Common Core. When one undertakes the development or modification of a curriculum, there must data and evidence that supports the need for curricular changes.

Curriculum development is often done in a group. If the learner is a part of a curriculum development team, their role in the development process must be clearly described.

Curriculum Components

The following components are common in many curriculum documents and learners are encouraged to use them if they are developing a curriculum. If these components do not align with the organization’s policies and procedures for which the curriculum is being developed, the learner should use the process required in their organization.

- Establish a clear curriculum philosophy, missions and vision to guide the curriculum development.
- Align to a set of curricular standards or industry standards and expected outcomes.
- Establish overarching goals.
- Provide structure for continuity among multiple users.
- Build in flexibility enough to accommodate individualization in teaching styles.
- Align the curriculum vertically among grade levels to understand when concepts among grade levels should be introduced, reinforced, mastered and assessed.
- Build in efficiency in terms of development time, cost, and professional development for users.
- Provide a scope and sequence.
- Develop a curriculum map.
- Solicit feedback from curriculum and content experts.
- Develop an assessment plan to evaluate student achievement including formative and summative evaluation.

Curriculum Development Resources


Sanders, W. L. & J. C. Rivers. (1996). *Cumulative and residual effects of teachers on future student academic achievement.* Knoxville: University of Tennessee Value-Added Research and Assessment Center


**Curriculum Development Key Word Searches**

- Curriculum Development Basics
- Principles of Curriculum Development
DEVELOPING A COURSE

Introduction

Designing a course provides the opportunity to incorporate creativity and best practices while at the same time ensuring that outcomes are aligned to academic standards and promote critical thinking and problem solving for living in the 21st Century. Course developers and instructional designers should have an understanding of learning theory and cognitive load theory to promote deep learning. This resource is an excellent summary of four categories of learning theory: Behaviorism, Cognitive, Humanistic and Social.

Note: Links have been provided for a select few elements for course development. Doctoral learners should continue to do searches for the elements for which links have not been provided if they want more information.

Please note that the organization of courses can vary from institution to institution. The overarching guideline is that the course should contain every element necessary for the course including all instructor material and all student material.

Course Development Components

The following components should be taken into account when developing a course:

Accessibility

It is critical that designers of online courses understand accessibility issues for learners with disabilities in compliance with the Americans with Disabilities Act.

Copyright

All course material must follow copyright and fair use.

Aligning Courses to Academic Standards, a Framework or Industry Standards

Aligning courses to local, state or industry standards is critical and necessary criteria for many accrediting agencies. Clearly identify the academic or industry standards to which the course outcomes are aligned. Key Word Searches: Aligning to Courses Standards

Division of Course Units

The course should be divided into modules consistent with the school’s policies

Course Overview

Every course should have a course overview. As the name implies, the course overview should give the student an abstract of what to expect in the course. It should also get the students attention in a way that makes them interested in taking the course.

Course alignment

The outcomes, learning materials, media, readings, assignments, scoring guides/rubrics, discussions (as appropriate), instructor resources, and any and all things associates with teaching a course

Learner Outcomes

Student outcomes should clearly state expectations in measurable terms. Outcomes should be developed to elicit knowledge, skills and critical thinking/problem solving.

Learning Activities

Activities should be designed to promote active learning aligned with the outcomes. Avoid “busy work.”
Discussion Questions
If you are designing an online or blended/hybrid course, writing of discussion questions is important in the online environment to promote collaboration and to monitor student progress. Prior to starting a new discussion, it should be clearly stated to all involved why the discussion is important and the learning that should take place from the discussion.

Assessments
Every learner outcome should be assessed. The assessment should demonstrate the student’s ability to perform the outcome. Every assessment should have an associated rubric.

Rubrics
Every assignment should have a rubric or scoring guide appropriate to the type of assessment being administered. The type of scoring product is a professional decision made by the course developer. Key Word Search: Developing Rubrics

Syllabus
Every course should have a syllabus whether it is offered face-to-face, online, or in a blended/hybrid configuration. Key Word Search: Creating a Syllabus

Multimedia
Multimedia, when used properly can enhance learning and become a key aspect of the course. Before implementing multimedia, understand how it will enhance the learning. Never use multimedia technology simply for the sake of technology. Key Words: Using Multimedia Effectively

Course Development Key Word Searches
- Developing Courses
- Developing Training Courses for Business and Industry

Books and Articles for Course Development


**Learning Theory**


**Adult Learning Theory**


**Web Sites**

- [Self Study Guide in Instructional Design](#)
- [Survey of Instructional Development Models. ERIC Digest](#)
- [Instructional Design and Learning Theories](#)
- [Tips for Rapid Instructional Design](#)
- [Problem-Based Learning](#)
- [Funderstanding—About Learning](#)
- [Learning Theory & Instructional Strategies Matrix](#)
- [The Theory into Practice (TIP) Database: Explorations in Learning & Instruction](#)

**Organization**

- [American Society for Training and Development (ASTD)](#)
- [International Society for Performance Improvement (ISPI)](#)

**Journals**

- *British Journal on Educational Psychology*
- *Educational Psychology*
- *Journal of Educational Psychology*
PROFESSIONAL DEVELOPMENT

Introduction
A caveat must be taken into consideration when creating professional development opportunities for professionals. The content, the context, and the participants are critical to the scope and sequence of the professional development event. There is no specific template for the developer to follow but this guide has suggested elements. Professional development may be developed in a variety of venues from face-to-face, online, hybrid, etc. Learners are encouraged to be creative and innovative in the manner in which the professional development is offered.

Professional Development Components
When taking on the development of professional learning, it is important for the developer to understand what knowledge, skills and strategies are important for the participants to know and be able to do at the end of the professional development. The following components of professional development must be considered:

- prior knowledge of the participants;
- unique needs of adult learners;
- knowledge and skills to be developed;
- relevant job-embedded content and strategies for transfer of learning;
- delivery mode;
- optimum time and date(s);
- appropriate length of professional development;
- necessary follow-up to aide in the transfer of learning;
- evaluation strategies; and
- selection of the appropriate facilitator.

The above list is typical of what should be taken into consideration when designing professional development. This list could be expanded depending on the context and content of the training.

The following elements are suggested for professional development - regardless of the delivery mode (electronic or face-to-face):

- learning Outcomes;
- overview for participants;
- presentation Materials;
- active Learning Strategies;
- any necessary handouts or supplemental materials;
- planned follow-up;
- facilitator’s Guide;
- learner’s Guide; and
- evaluation of participant’s achievement of learning outcomes.
Best Practices for Professional Development

The following suggestions are taken from the Standards for Professional Learning developed by the professional organization, Learning Forward and should be considered when developing a curriculum product.

- Promote Learning Communities
  - Promoting learning communities can increase educator effectiveness and enhance continuous improvement.

- Leadership Support
  - Effective professional development requires strong leadership to develop capacity and create support systems for professional learning.

- Resource Allocation
  - Professional development effectiveness requires appropriate monitoring and coordinating resources to enhance educator and student learning.

- Data
  - Data plays a dual role in professional development. The first role or purpose of data is to inform the need for the focus of the professional development. Data could be student test schools, educator, and system data. The same data can be used in the second role to assess the effectiveness of professional learning.

- Change
  - Professional Development should promote change. The strategies to promote change should apply research and theory to sustain and support professional learning for long term change.

- Professional Development Outcomes
  - Professional learning that increases educator effectiveness should align with educator performance and academic curriculum standards.

NOTE: When developing a Professional Development event for your Doctoral Capstone Project, the final deliverable should contain a Facilitator’s Guide so that anyone facilitating the PD will have a guide that takes him or her through all the steps.

Key Word Search for Training

- Best Practices for Training
- Training and Development
- Talent Development

Professional Development Resources


DEVELOPING A TRAINING CURRICULUM

Introduction
Training curriculum is a total package of learning activities designed to achieve the objectives of the training program. In a corporate setting, the objective, or desired end, is that trainees will acquire the specific knowledge and skills (competencies) they need to do their jobs.

The training curriculum process begins with a needs assessment and ends with an evaluation of the training and training process.

The curriculum development process can be categorized into four basic steps:
1. needs assessment;
2. the planning session;
3. content development;
4. pilot delivery and revision

Corporate curriculum developers may use one of the design models available in the literature or a format specified for the organization the curriculum is designed for. There are four primary components to be considered when developing any training curriculum:
1. the needs of the learners;
2. the content or information to be delivered;
3. the organization of the curriculum which includes structure, format, and sequencing; and
4. the training methods used (face-to-face, virtual, or blended deliveries).

Training Curriculum Components
A training curriculum project may include a course, a series of modules, or an entire curriculum designed to meet the goals and strategic objectives of an organization. The completed curriculum package should include, at a minimum:

- general theme or topic;
- goals and objectives;
- lesson plans with trainer guides;
- training aids and resources;
- assessment activities; and
- evaluation of the training and training process.

Training Curriculum Resources


**Searches Related to Developing Training Curriculum**

- sample training curriculum
- training curriculum design template
- training curriculum template
- designing training curriculum
- designing a training program for employees
- curriculum design training course
- training material development process
- curriculum development training seminars

**Training Curriculum Websites**

- ADDIE Model
- Building Your Curriculum Development and Training Skills
- Creating Training Curriculum is Now Simple – A 6 Step Process [Video]
- Developing and Maintaining Technical Training Curriculum
- Nuts and Bolts of the Curriculum Process
- Overview of the Curriculum Development Process
- Time to Develop One Hour of Training
- Training Design: Principles and Strategies
- Training Material Development Guide
• What is Curriculum.