

APPENDIX F

Worksheets for Analysis Phase

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An accurate and complete analysis is the basis for almost all of the future design and development decisions. Using a standard and systematic way of capturing the results of the analysis process will ensure that accurate data is passed to the next phase and that an audit trail exists for the decisions made during the analysis phase of the resident instruction project. These worksheets are designed to be used in concert with the Analysis Phase Job Aids presented in *Appendix E*.

Note: *There is not a one-to-one relationship since not all job aids need a standard way of capturing the associated data.*

Worksheet Number	Worksheet Title
WS – F.1	Task Analysis – Task Detailing Worksheet
WS – F.2	Target Audience Profile Worksheet
WS – F.3.A	Course Parameters and Constraints – General Worksheet
WS – F.3.B	Course Parameters and Constraints – Delivery Worksheet
WS – F.3.C	Course Parameters and Constraints – Design and Development Worksheet
WS – F.3.D	Course Parameters and Constraints – Testing and Evaluating Worksheet

Worksheet Access

Samples of the worksheets are included in this appendix. Refer to the *SOP Downloads (Word Version)* page on TRACEN Petaluma's internet website for the most recent and usable copies of all Worksheets and Templates:

<http://www.uscg.mil/hq/cg1/TracenPetaluma/SOP/default.asp>

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WS – F.2: Target Audience Profile Worksheet

Page 1

WS-F.2		Target Audience Profile	
Project			
Designer		Date	
Data Sources(s)			
Job		Job Specialty	
Primary Audience Relevant or Key Characteristics			
Section 1 - Aptitudes / Abilities			
Current knowledge of tasks/work or subject matter area	High	<input type="checkbox"/>	Additional Details
	Average	<input type="checkbox"/>	
	Limited	<input type="checkbox"/>	
	None	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	
Relevant background and experience	High	<input type="checkbox"/>	Additional Details
	Average	<input type="checkbox"/>	
	Limited	<input type="checkbox"/>	
	None	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	
Section 2 - Tools and Prerequisite Skills			
Specific tool(s) or prerequisite skills abilities			
Specific tool(s) or prerequisite skills deficiencies			

WS – F.2: Target Audience Profile Worksheet, Continued

WS-F.2		Target Audience Profile	
Project			
Designer		Date	
Other deficiencies that may require special attention			
Primary Audience Relevant or Key Characteristics			
Section 3 - Learning and Language Preferences			
Vocabulary or terminology understanding - Technical	High	<input type="checkbox"/>	Additional Details
	Average	<input type="checkbox"/>	
	Limited	<input type="checkbox"/>	
	None	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	
Vocabulary or terminology understanding – Non-Technical	High	<input type="checkbox"/>	Additional Details
	Average	<input type="checkbox"/>	
	Limited	<input type="checkbox"/>	
	None	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	
Overall language skill level (mastery of spoken and written language)	High	<input type="checkbox"/>	Additional Details
	Average	<input type="checkbox"/>	
	Limited	<input type="checkbox"/>	
	None	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	
Overall reading skill level	High	<input type="checkbox"/>	Additional Details
	Average	<input type="checkbox"/>	
	Limited	<input type="checkbox"/>	
	None	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	
Overall math skill level	High	<input type="checkbox"/>	Additional Details
	Average	<input type="checkbox"/>	
	Limited	<input type="checkbox"/>	
	None	<input type="checkbox"/>	
	Unknown	<input type="checkbox"/>	

WS – F.2: Target Audience Profile Worksheet, Continued

Page 3

WS-F.2		Target Audience Profile	
Project			
Designer		Date	
Overall computer literacy level	High <input type="checkbox"/> Average <input type="checkbox"/> Limited <input type="checkbox"/> None <input type="checkbox"/> Unknown <input type="checkbox"/>	Additional Details	
Overall verbal communication and interpersonal skill level	High <input type="checkbox"/> Average <input type="checkbox"/> Limited <input type="checkbox"/> None <input type="checkbox"/> Unknown <input type="checkbox"/>	Additional Details	
Learning preferences or learning styles (if known) <i>(i.e. information or techniques that may cause a negative reaction)</i>			
Primary Audience Relevant or Key Characteristics			
Section 4 – Learner Attitude / Motivation			
Attitude to organization	Eager <input type="checkbox"/> Neutral <input type="checkbox"/> Resistant <input type="checkbox"/> Unknown <input type="checkbox"/>	Additional Details	
Attitude to job	Eager <input type="checkbox"/> Neutral <input type="checkbox"/> Resistant <input type="checkbox"/> Unknown <input type="checkbox"/>	Additional Details	
Attitude to training <i>(i.e. willingness to accept the content of the training)</i>	Eager <input type="checkbox"/> Neutral <input type="checkbox"/> Resistant <input type="checkbox"/> Unknown <input type="checkbox"/>	Additional Details	
Section 5 – Additional Audience Details			
Overall length of time with the organization	New <input type="checkbox"/> 2-3 Years <input type="checkbox"/> 4+ Years <input type="checkbox"/> Mixed <input type="checkbox"/>	Other cultural or heritage issues that may require special attention	

WS-F.2 – Target Audience Profile

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WS – F.2: Target Audience Profile Worksheet, Continued

Page 4

WS-F.2		Target Audience Profile			
Project					
Designer				Date	
Majority age range of audience	18-24	<input type="checkbox"/>	In general, gender distribution	% Male	
	25-30	<input type="checkbox"/>		% Female	
	31-35	<input type="checkbox"/>	In general, distribution between types of units	% Afloat	
	36+	<input type="checkbox"/>		% Ashore	
	Mixed	<input type="checkbox"/>	In general, distribution of students attending directly from boot camp		
Other additional details					
Primary Audience Population Description					
Section 6 – Summary of relevant or key characteristic for consideration during design & development					
Optional - Secondary Audience Population Description					
Section 7: Summary of relevant or key characteristic for consideration during design & development					

WS – F.3.A: Course Parameter and Constraints - General Worksheet

General, Page 1

WS-F.3.A Course Parameter and Constraints: Part A - General			
Project			
Designer		Date	
Data Sources(s)			
Is training mandated? If yes, by whom?		No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments
Are job / job specialty procedures changing rapidly?		No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments
Are methods and/or procedural documents available for use in classroom? If not, what is the scheduled release date?		No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments
Initial number of students?	Comments	Anticipated number of students per year?	Comments
Are Accomplished Performers (APs) available?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Are Subject Matter Experts (SMEs) or Subject Matter Specialists (SMSs) available?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Are media developers available?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	

WS – F.3.A: Course Parameter and Constraints – General Worksheet, Continued

General, Page 2

WS-F.3.A		Course Parameter and Constraints: Part A - General	
Project			
Designer		Date	
Are editors available?	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	
Is due date fixed (pre-defined or mandated) and cannot be negotiated to meet the normal Instructional Systems design, development, testing and/or evaluating process?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Must live within the budget?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Must live within the specified content of the training?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Any other additional General Constraints or Parameters; included details in the "Comments" section	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Summarize key constraints and/or parameters and include any coping strategies or contingency plans.			

WS – F.3.B: Course Parameter and Constraints – Delivery Worksheet

Delivery, Page 1

WS-F.3.B		Course Parameter and Constraints: Part B - Delivery	
Project			
Designer		Date	
Has the duration of the training been pre-specified/defined? If yes, will the course timeline be sufficient?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Are instructional methods pre-specified/defined? (i.e. blended delivery method could not be utilized?)	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Are delivery funds available to support other delivery methods?	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	
Is the Instructor/student ratio (I:S) pre-specified/defined?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Will there be trained instructors available to teach?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Is there sufficient and suitable classroom space?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Are Lab facilities relevant to job/specialty available for training?	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	
Are any other facilities, such as a wet room, equipment storage room available for training?	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	

WS – F.3.B: Course Parameter and Constraints – Delivery Worksheet, Continued

Delivery, Page 2

WS-F.3.B		Course Parameter and Constraints: Part B - Delivery	
Project			
Designer			Date
Is the existing training hardware adequate?	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	
If new hardware is still being developed? If no, is it available for purchase and is there adequate budget to buy it?	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	
Is there an existing simulator associated with the course? If yes, will there be times when it is unavailable to the students?	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	
Are there any safety factors, which may prevent some types of training delivery activities?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Are there reasons why the student cannot observe activities in the actual job performance situation, if needed?	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Are there any other delivery concerns? Please specify in the "Comments: section.	No <input type="checkbox"/> Yes <input type="checkbox"/> Unknown <input type="checkbox"/>	Comments	
Summarize key constraints and/or parameters and include any coping strategies or contingency plans.			

WS – F.3.C: Course Parameter and Constraints – Design and Development Worksheet

Design and Development, Page 1

WS-F.3.C		Course Parameter and Constraints: Part C – Design/Develop	
Project			
Designer		Date	
Must accommodate wide-range of entry skills/knowledge?	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		
Must-live-within the pre-specified teaching methods (activity and/or media)?	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		
High levels of simulation are not practical.	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		
Budget possibly too low to accommodate some required design?	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		
Student-Instructor ratio probably too great.	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		
Student unavailability must be accommodated.	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		
Remediation activities possibly prevented.	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		
Length of training pre-specified?	No <input type="checkbox"/>	Comments	
	Yes <input type="checkbox"/>		

WS – F.3.C: Course Parameter and Constraints – Design and Development Worksheet, Continued

Design and Development, Page 2

WS-F.3.C		Course Parameter and Constraints: Part C – Design/Develop	
Project			
Designer		Date	
Media development capabilities not present and unable to purchase?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Instructor unavailability will prevent some design?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Recurring training is a must.	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Are there any other design or development concerns? Please specify in the "Comments: section"	No <input type="checkbox"/> Yes <input type="checkbox"/> Not Req <input type="checkbox"/>	Comments	
Summarize key constraints and/or parameters and include any coping strategies or contingency plans.			

WS – F.3.D: Course Parameter and Constraints – Testing and Evaluating Worksheet

Testing and Evaluation, Page 1

WS-F.3.D		Course Parameter and Constraints: Part D – Testing and Evaluating	
Project			
Designer		Date	
Will students be available to try-out and test the training material and/or job aids?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Evaluation method pre-specified?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Possible disagreement on what “success” is?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Formal qualification or certification required?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Re-qualification or re-certification required?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Safety factors preclude some evaluation methods?	No <input type="checkbox"/> Yes <input type="checkbox"/>	Comments	
Simulator not always available for testing?	No <input type="checkbox"/> Yes <input type="checkbox"/> N/A <input type="checkbox"/>	Comments	
Other concerns? Please specify in the “Comments: section	No <input type="checkbox"/> Yes <input type="checkbox"/> N/A <input type="checkbox"/>	Comments	

WS – F.3.D: Course Parameter and Constraints – Testing and Evaluating Worksheet, Continued

Testing and
Evaluation,
Page 2

WS-F.3.D		Course Parameter and Constraints: Part D – Testing and Evaluating	
Project			
Designer		Date	
Summarize key constraints and/or parameters and include any coping strategies or contingency plans.			