

# DETAILED DESIGN

Improving client satisfaction with online language lessons for professionals

ETEC-650-2224 Winter 2023

Fundamentals of Human Performance Technology

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## Intervention 1: Performance Management System

The first intervention selected from the Intervention Roadmap (Appendix 1) of our High-Level Design analysis was to build a Performance Management System (PMS). Performance management helps achieve business as well as individual goals. It is used as a tool to boost employees' productivity by clearly defining their role and aligning it with the company's objective.

The PMS will be implemented to establish and communicate unambiguous performance expectations, and formally set and measure performance standards across the organization from the top down. It will be used to provide quarterly and annual performance reviews and evaluations to all employees (L&D team and online language instructors). In that way, a well-designed PMS will help employees to understand their roles and responsibilities in the company. When they have a clear interpretation of what is expected of them, they can better align their individual performance goals with organizational performance goals.

### Overview and Description

<b>Sponsor</b>	The President of ABC language school
<b>Users</b>	L&D team: L&D Director, Logistics/ Client Coordinator, LMS Administrator, Supervisors Online language instructors
<b>Performance objectives addressed</b>	<ul style="list-style-type: none"> <li>• Achieve the required 90% client satisfaction rating with online language lessons.</li> <li>• Language instructors are:             <ul style="list-style-type: none"> <li>• Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>• Using MS Teams to effectively deliver interactive and collaborative language lessons with minimum 80% interactive whiteboard usage rate.</li> <li>• Increasing participation of corporate learners in online classes and knowledge sharing forums with minimum 80% participation rate</li> <li>• Increasing self-study learning activities accessed by learners in LMS to the required minimum of 60 minutes per week outside of class time.</li> <li>• Regularly making content contributions to improve language lessons.</li> </ul> </li> <li>• The L&amp;D team is:</li> </ul>

	<ul style="list-style-type: none"> <li>Monitoring instructor performance against standards at end of each contract</li> <li>Coordinating and scheduling online language courses efficiently i.e., reducing lesson delays, postponements, and cancellations to the required minimum of less than 10% cancellation/ postponement rate</li> <li>Communicating up-to-date information effectively to instructors, L&amp;D team</li> <li>Updating and communicating learning content and access links to LMS on a monthly basis (minimum)</li> </ul>
<b>Genre or form</b>	<ul style="list-style-type: none"> <li>Format: Software – an HR software for performance tracking, review, and evaluation to record employee SMART goals and performance KPIs/ metrics, deliverables, processes, and timelines, current vs. ideal performance levels and gaps, signatures, standards etc.</li> </ul>
<b>Communication medium</b>	<ul style="list-style-type: none"> <li>Online portal</li> <li>Advantages: easy access for individual employee and their supervisor/ manager, performance standards and expectations with metrics, deliverables, processes, and timelines are formally listed, ease of collaboration in a shared platform/ HR portal</li> </ul>
<b>Timeline</b>	<p>May – August 2023 (set up, customization and installation)</p> <p>September – December 2023 (pilot and roll-out)</p>
<b>Description</b>	<ul style="list-style-type: none"> <li>Reasons for choosing intervention: <ul style="list-style-type: none"> <li>To set clear performance expectations and specific performance standards for online language instructors and L&amp;D team (Logistics/ Client Coordinator, LMS Administrator, L&amp;D Supervisors)</li> <li>To facilitate performance reviews given by L&amp;D Supervisors to language instructors</li> <li>To facilitate performance reviews given by L&amp;D Director to L&amp;D team members</li> <li>To maintain a continuous flow of communication between employees and management, which helps yield productivity and maximize business profits.</li> <li>To drive employees' development and help them achieve their career goals</li> </ul> </li> <li>Design: Third-party SAS or customizable HR software solution which includes <ul style="list-style-type: none"> <li>Performance dashboard: clear, user-friendly, and visual cockpit/ charts capable of storing information like career progress, peer recognition, feedback forms, and other performance-related data</li> <li>Customizable, readily available reports to provide detailed insights into every employee's actions</li> <li>Clear rating metrics based on SMART goals</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>• Writing style: (business) formal, succinct, and detailed</li> </ul>
<b>Material to develop</b>	<ul style="list-style-type: none"> <li>• Prototype online interface (see next section)</li> </ul>

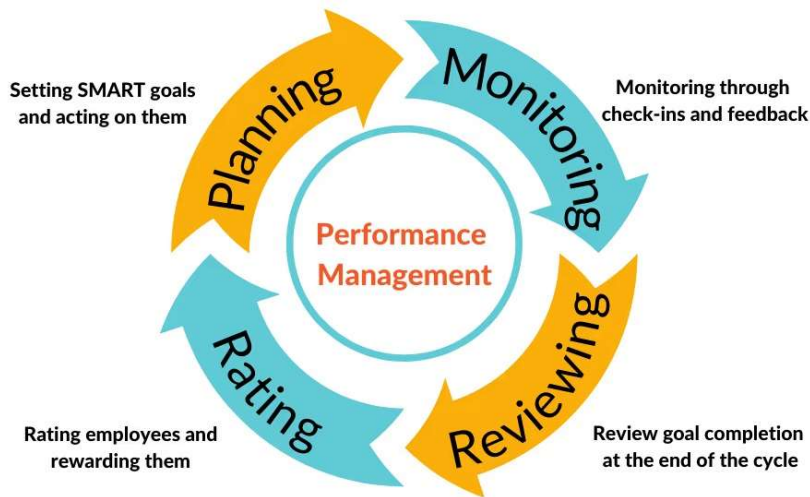
### **Prototype Online Interface**

An analysis of the leading Performance Management software on the market was conducted, to select an appropriate HR software solution that streamlines the performance review process through performance tracking for key metrics, according to each team member's job description. The selection criteria were:

- User Interface (UI): clean and attractive interface that makes the performance review process straightforward to follow.
- Usability: a system that clearly organizes and tracks different elements of the performance management process and includes easy-to-understand performance-based visuals like historical charts and comparison graphs.
- Software Integrations: a system that integrates directly with human resources information systems (HRIS) or other similar platforms to reduce the need to manually transfer data from one system to another.
- Value for Price: transparent pricing, so you can forecast your monthly or annual fees prior to requesting a demo or free trial.

### ***PerformYard*: our selected Performance Management System**

*PerformYard* was selected since this flexible cloud-based solution provides all the tools to build out a performance review strategy, including annual reviews, quarterly goals, 360-degree reviews, project-based reviews, feedback, and cascading goal structures. Employees will benefit from a simple and streamlined performance review process focused on effective discussions and delivering quality feedback on performance. In addition to the annual performance review cycle, *PerformYard* will help run regular check-in meetings, capture continuous feedback, recognize staff achievements, and document employee goals. The platform integrates easily with the company's existing HR system and offers free and unlimited customer support through a dedicated customer success manager. It ranks among the top performance management software for companies with 50-1000 employees, includes a free demo, and costs \$5-10 per employee per month (within project budget) for a one-year contract for eighty employees (current headcount).



Source: <https://engagedly.com/the-4-stages-of-a-performance-management-cycle/>

A performance management cycle is a continuous process of planning, implementing, measuring, and analyzing employee performance (Chellappa, 2023). Performance appraisal cycles can be annual, semi-annual, or quarterly, and should be coupled with regular feedback. The four stages are:

- **Planning** SMART goals
- **Monitoring** by constant follow-up and continuous feedback
- **Reviewing** at the end of each cycle to develop employees
- **Rating**, recognition & rewards

PerformYard

Search employee...

Dashboard Feedback Reviews Goals Documents

**Review Forms**

NAME	SUBJECT	STATUS	ACTION
Peer Review Form	Ian Cowles	Due 9 days ago	Sign >
Self Evaluation Form	Ian Cowles	Due 9 days ago	Sign >
Goal Review Form with Rati...	Ian Cowles	Due in 5 days	Author >

Current Forms  
3 to author 2 to sign

**Reviews**

- Performance Check In
- Jenny Sherman
- Completed 6 days ago
- 100%

**Feedback**

- Ian Cowles is requesting feedback
- Jessica Hernandez gave recognition about Cindy King
- Colin Graham gave feedback about 2 employees

Recognition only

**Goals**

Goal Outlook

- On Schedule/Target
- Caution

41% Average Goal Completion

- 0 overdue
- 0 updates
- 4 active

Manager: Jenny Sherman (jcourtney@performyard.com)

Manager: Cindy King

Direct Reports: +3

### 1. Performance Reviews

PerformYard's reviews include monthly 1-on-1s, quarterly goal setting and check-ins, and an annual review process that helps monitor and improve employee performance and achievements.

By combining **self-evaluations** with **cascading goals** and **peer feedback**, the software provides a well-rounded snapshot of individual performance. The result is a user-friendly and easy to access dashboard with up-to-date data on job quality, skills assessment, performance levels and positive and negative feedback (see image).

**1** Managers and supervisors select employees to review using "Open Review" button.

**2** Performance Check In Of Monica Green

**3** After review completion, employees must sign off on it to conclude the review cycle,

**4** Building Your Cycle

SUBJECT	DUE DATE	AUTHOR PROGRESS	SIGNERS PROGRESS	OVERALL PROGRESS	UNASSIGNED	EXTERNAL	DELETE
<a href="#">Open Review</a> Ian Cowles	Feb 16, 2018 5:00 pm	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>	Completed Jan 25, 2018 12:36 pm			
<a href="#">Open Review</a> Liz Finch	Feb 16, 2018 5:00 pm	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>	Closed Jan 26, 2018 2:36 pm			
<a href="#">Open Review</a> Marc Johnson	Feb 16, 2018 5:00 pm	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>				
<a href="#">Open Review</a> Ted Dalton	Feb 16, 2018 5:00 pm	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>	Completed Jan 25, 2018 10:40 am			

SUBJECT	AUTHOR PROGRESS	SIGNERS PROGRESS	OVERALL PROGRESS
Ian Cowles	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>	
Monica Green	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>	Completed Aug 11
Patricia Wolfe	<div style="width: 100%;"></div>	<div style="width: 100%;"></div>	Completed Aug 11

PerformYard's Performance Reviews seamlessly facilitate the **Monitoring, Reviewing** and **Rating** stages of a performance appraisal cycle as illustrated above and on the following page (Source: <https://www.performyard.com/>):

- Customizable Forms and Cycles: System inputs such as review questions, forms, templates, and timelines can be customized to meet organizational and individual employee needs.
- Deployment & Progress Tracking: Review cycles can be launched at any time, and a live progress dashboard makes it easy for managers and supervisors to monitor who has done what to ensure timely completion of important reviews.

**360/Peer Review Of Ian Cowles**  
 This review began on October 2, 2017 9:00 pm

There are **3 total authors** : **3 completed** **0 waiting** **0 overdue**

**360-Peer Review Form**

**Overall Performance**  
 Provide a general description of your interactions with the employee.  
 Provide a brief detail, such as worked with employee on a team, managed employee's performance on a task, received direction from employee.

Answer from **Marc Johnson**  
 I helped manage Ian on a cross-organizational team that supported one of our highest profile clients.

Answer from **Monica Green**  
 Ian worked for me on two engagement teams where I provided much of the direction

Answer from **Patricia Wolfe**  
 Ian and I worked on security reviews together. While we were peers, he was a little less experienced in the subject matter.

**Peer Evaluated Performance**  
 How would you rate this employee's performance during this period on a scale of 1-5? In answering this question, use the following scale  
 1 - Did Not Meet Expectations  
 2 - Met Some but Not All Expectations  
 3 - Fully Met Expectations  
 4 - Exceeded Expectations  
 5 - Significantly Exceeded Expectations

Internal (360) and External Inputs

*PerformYard* allows 360 reviews that incorporate inputs from people across the organization, as well as from externally. Users can include self-assessments, peer reviews, feedback from direct reports, and multiple managers or executives.

Analysis and Results

Results of employee performance reviews can be easily analyzed and compared through a variety of visuals and exports. The calibration analysis and reporting tools help to identify and reward top performers.

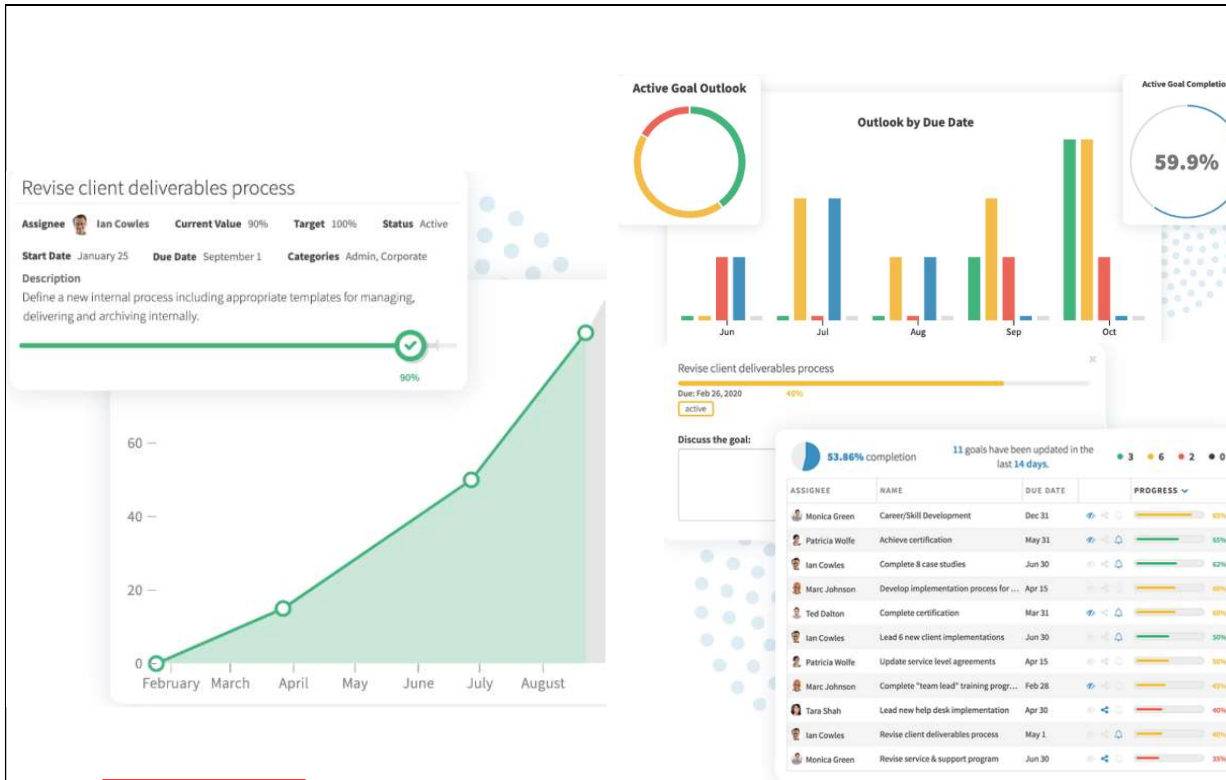
**53.86% completion** 11 goals have been updated in the last 14 days.

ASSIGNEE	NAME	DUE DATE	STATUS	PROGRESS
Monica Green	Career/Skill Development	Dec 31, 2017	Active	85%
Patricia Wolfe	Achieve certification	May 31, 2018	Active	65%
Ian Cowles	Complete 8 case studies	Jun 30, 2018	Active	62%
Marc Johnson	Develop implementation process for ...	Apr 15, 2018	Active	60%
Ted Dalton	Complete certification	Mar 31, 2018	Active	60%
Ian Cowles	Lead 6 new client implementations	Jun 30, 2018	Active	50%
Patricia Wolfe	Update service level agreements	Apr 15, 2018	Active	50%
Marc Johnson	Complete "team lead" training progr...	Feb 28, 2018	Active	45%
Tara Shah	Lead new help desk implementation	Apr 30, 2018	Active	40%
Ian Cowles	Revise client deliverables process	May 1, 2018	Active	40%
Monica Green	Revise service & support program	Jun 30, 2018	Active	35%

**2. Goal Management**

*PerformYard* facilitates the **Planning** stage of a performance cycle by allowing managers and employees to set and communicate long- and short-term SMART goals, tied to the company's strategy and objectives. These cascading goals are broken down into executable parts, with clear expectations, responsibilities, timelines, and contributions assigned across the organizational structure.





Progress Tracking and Insights

Every manager or supervisor can define and track individual goals and KPIs for their team members, and each goal has its own repository for updates, feedback, and collaboration (in case of shared team goals).

Performance goals are tracked in a consistent and repeatable process and progress updates are displayed in clean charts and dashboards. The visibility generated by these updates and rollups provides valuable insights about where team members are excelling, and where they might be falling off track, and can be used to adjust resources and change direction, if needed.

**FEEDBACK**

Who is this feedback about?  
 Search for employee... **ADD MYSELF**

Brad Palmer

Who will you share this feedback with?  
 Subject  
 And Subject's Manager  
 Only Subject's Manager  
 Do Not Share [Private Note](#)

Feedback  
 Discussed Brad's recent performance - highlighted recent wins and the results of his efforts; also discussed the challenges he has faced lately. Brad needs to keep up the positive attitude, which I recognize has been tough, but it's paying off with how his colleagues and clients perceive him.

Feedback history for Colin Graham:  
 Colin Graham (Feedback - Nov 07 10:04 am)  
 Colin Graham (Recognition - Oct 18 3:05 pm)  
 Brad Palmer (Feedback - Sep 29 10:26 am)  
 Brad Palmer (Feedback - Sep 26 4:49 pm)  
 Brad Palmer (Feedback - Sep 26 4:49 pm)  
 Brad Palmer (Feedback - Sep 26 4:49 pm)

Feedback About Me  
 Feedback I've Given  
 My Team's Feedback  
 My Notes

Feedback details for Colin Graham:  
 Subject: Colin Graham  
 Author: Brad Palmer  
 Shared with subject's manager  
 Colin really went out of his way to assist me on the last deal we closed in October. He stepped up to provide the necessary inputs to the proposal process, filling in the gaps that we had. Without his help, we wouldn't have gotten it done. #newsales #teamwork  
 Last Updated: November 7 10:04 am

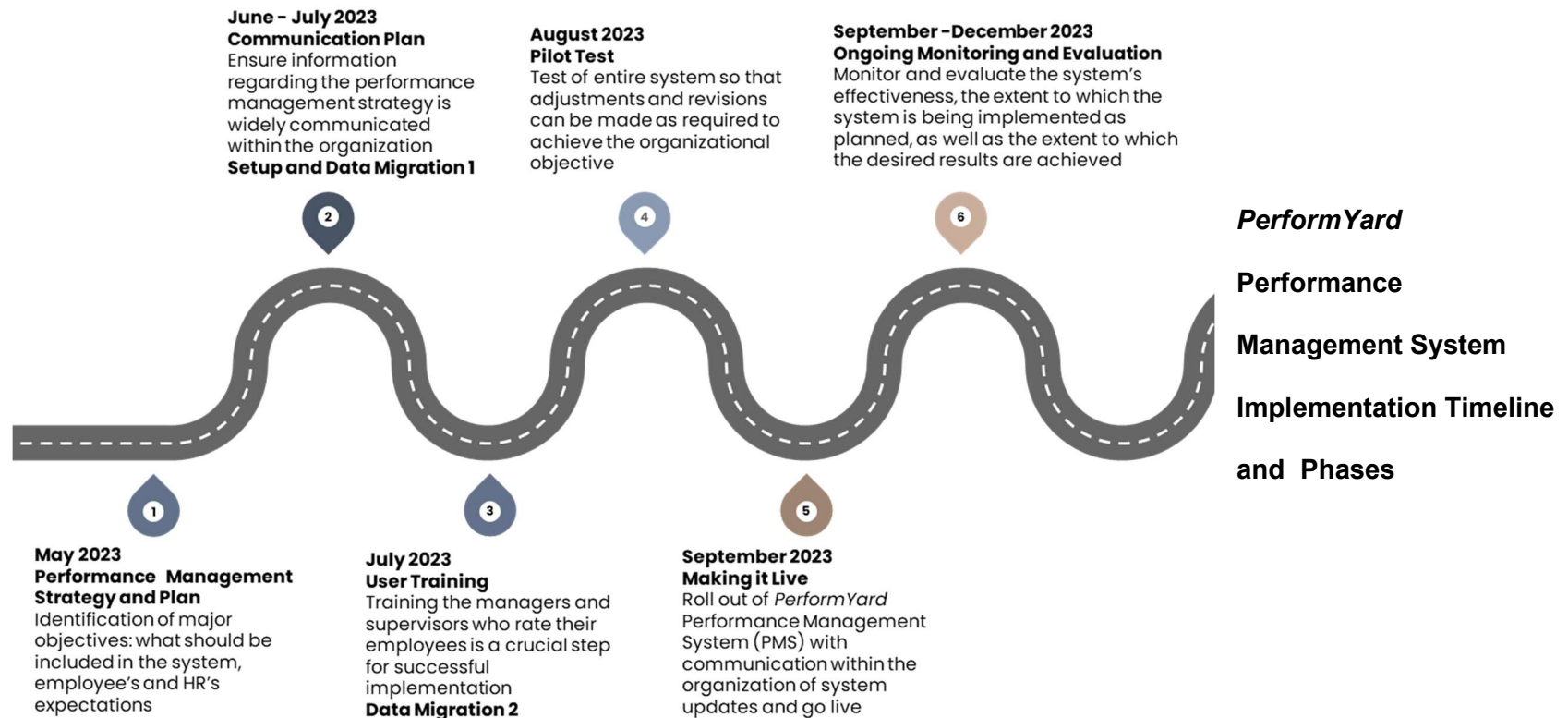
**3. Continuous Feedback**

PerformYard facilitates the **Monitoring** stage of a performance appraisal cycle through constant follow-up and ongoing 1-1 feedback in real time (instead of waiting until review time) to recognize achievement and document individual performance. Feedback can be shared with employees, teams, and managers in a clear, privacy-conscious manner.

The Performance Management system (PMS) will be implemented in the following steps:

1. **Performance management strategy and plan:** Identification of major objectives such as what should be included in the system, what are the employees' expectations, what does the HR department expect to see in the performance review forms etc. For a sample performance review form please refer to Appendix 2 and the attached *Performance Review Form (Instructor).xls* file.
2. **Communication plan:** To gain organizational support and acceptance, a communication plan will be developed together with *PerformYard* to ensure that information regarding the performance management strategy and selected software is widely communicated within the organization. This plan should provide employees, supervisors, and managers with answers to the following questions: What is performance management? How does performance management fit into our strategy? How does it work? What are the top features of *PerformYard*, our selected Performance Management System? What's in it for me? What are my responsibilities? How is performance management related to other initiatives (current and future) within the organization?
3. **Training Program for Acquisition of Required Skills:** Adequately training the managers and supervisors who rate their employees is a crucial step for the successful implementation of the PMS and will help increase user satisfaction with it. Dedicated Customer Success Managers from *PerformYard* will be scheduled to conduct both on-site visits and online training.
4. **Performing a Pilot Test:** Before implementing the PMS, it is important to test a version of the entire system so that adjustments and revisions can be made as required to achieve the organizational objective. In the pilot testing phase, evaluations will not be recorded in the employee's files; however, the cycle is executed in its entirety from beginning to end, including all the steps that would be required if the system had actually been implemented. (See Formative Evaluation in the next section)

5. **Ongoing Monitoring and Evaluation:** Once the testing period is over and the performance management system is implemented throughout the organization, the next important priority is to use clear measurements to monitor and evaluate the system’s effectiveness, the extent to which the system is being implemented as planned, as well as the extent to which the desired results are achieved. Evaluation data can include reaction to the system, satisfaction with the system, assessments of the system’s operational and technical requirements, total number of individuals evaluated, quality of information etc. (Formative/ Summative)
6. **Making it Live:** Once all the performance management process steps are implemented, an e-mail or electronic newsletter can be used to circulate the information within the organization to communicate the updates regarding the system and go live.



**Formative Evaluation Plan**

The Formative Evaluation Plan for *PerformYard’s* Performance Management System (PMS) includes three types of reviews: (1) a technical review, (2) an editorial review, and (3) a pilot test. Details about these reviews are provided in the tables below.

**REVIEW 1. TECHNICAL REVIEW**

<p>Purpose of the evaluation</p>	<p>The purpose of the technical review is to ensure that the content of the <i>PerformYard</i> PMS is accurate, which means that the materials and data about the organization that were input into the system/ software program are up-to-date, factually correct, and thoroughly presented (Carliner, 2015).</p>
<p>When will the evaluation occur?</p>	<p>After Data Migration phase 1 and before Data Migration phase 2 (before pilot testing)</p>
<p>Who will participate in the evaluation? What expertise to they bring?</p>	<p>L&amp;D Director who not only brings extensive experience in corporate training, development, and performance appraisal systems, but will also lead the performance management and review process from the top-down.</p>
<p>Procedure for conducting reviews?  Drafts of materials needed for reviewers to conduct their reviews?</p>	<ul style="list-style-type: none"> <li>• By email, send a cover letter that provides complete instructions and detailed guidance to the reviewer. Include all the necessary material as attachments: setup instructions, visuals with notes, instructions for administering and debriefing PMS-related activities, closeout list</li> <li>• Receive comments from the reviewer.</li> <li>• Itemize the comments based on importance.</li> <li>• Hold a review meeting with the reviewer (if needed) to resolve any unclear comments.</li> <li>• Prepare an action plan of what to do next with the comments.</li> <li>• Repeat this process for the second Data Migration phase</li> </ul>
<p>Guidelines that will be used to assess the accuracy of the draft?</p>	<p>The content of the PerformYard PMS must be accurate: up-to-date, factually correct, and thoroughly presented (Carliner, 2015). Some guiding questions for the technical review:</p> <ul style="list-style-type: none"> <li>• Is the PMS user-friendly and intuitive to navigate?</li> <li>• Is the content of the PMS precise and relevant?</li> <li>• Is the content of the PMS presented in a clear, logical and comprehensive manner?</li> <li>• Are the different functions of the PMS (Reviews, Goals and Feedback) executable?</li> <li>• Do you have any additional comments/ suggestions for improvement?</li> </ul>

<p>Documents to be drafted? (See Appendix 3)</p>	<ul style="list-style-type: none"> <li>• Cover letter</li> <li>• Reminder</li> <li>• Thank you note to the reviewer</li> </ul>
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**REVIEW 2. EDITORIAL REVIEW (DEVELOPMENTAL AND COPY-EDITING)**

<p>Purpose of the evaluation?</p>	<p>The purpose of the developmental review is to evaluate the presentation of the content to the system users. The review focuses on the organization and clarity of the materials (Carliner, 2015).</p> <p>The purpose of the copy-editing review is to: (a) fix any issues in the program related to grammar, spelling, and punctuation, and (b) ensure compliance to the organization’s style guide and branding. (Carliner, 2015).</p>
<p>When will the evaluation occur?</p>	<p>Developmental review: At the end of the Data Migration phase 1                  Copy-editing editorial review: At the end of Data Migration phase 2</p>
<p>Who will participate in the evaluation? What expertise to they bring?</p>	<p><u>Developmental review:</u> A peer performance consultant who has not been exposed to this project, to bring a fresh perspective/ view to it.</p> <p><u>Copy-editing review:</u> Content specialist at the organization, who is responsible for copy-editing all materials that are produced for corporate training and development programs.</p>
<p>Procedure for conducting reviews?</p> <p>Drafts of materials needed for reviewers to conduct their reviews?</p>	<p>Developmental Review</p> <ul style="list-style-type: none"> <li>• By email, send a cover letter that provides complete instructions and detailed guidance to the reviewer. Include all the necessary material as attachments: setup instructions, visuals with notes, instructions for administering and debriefing PMS-related activities, closeout list</li> <li>• Receive comments from the reviewer.</li> <li>• Itemize the comments based on importance</li> <li>• Hold a review meeting with the reviewer (if needed) to resolve any unclear comments.</li> <li>• Prepare an action plan of what to do next with the comments.</li> </ul> <p>Copyediting review:</p>

	<ul style="list-style-type: none"> <li>• By email, send a cover letter that provides complete instructions and detailed guidance to the reviewer. Include all the necessary material as attachments: setup instructions, visuals with notes, instructions for administering and debriefing PMS-related activities, closeout list</li> <li>• Receive comments from the reviewer.</li> <li>• Discuss any unclear comments with the reviewer (if needed)</li> <li>• Integrate any necessary copyedits into the final draft</li> </ul>
Guidelines that will be used to assess the accuracy of the draft?	<p><u>Developmental review:</u> The PMS must be organized and clear. It must flow easily between units and make sense as a complete package/ system. Written text, including visuals, must convey the key messages to users. (Carliner, 2015)</p> <p><u>Copy-editing review:</u> The PMS contents must follow proper rules for grammar, punctuation, and spelling. The PMS contents must adhere to the organization’s style guide (where applicable) which includes logos, branding, and fonts. (Carliner, 2015)</p>
Documents to be drafted? (See Appendix 3)	<ul style="list-style-type: none"> <li>• Cover letter (developmental and copyediting)</li> <li>• Reminder (developmental and copyediting)</li> <li>• Thank you note (developmental and copyediting)</li> </ul>

### REVIEW 3. PILOT TEST

Purpose of the evaluation?	The purpose of the pilot test is to identify aspects of the PMS that may need improvement. This is done by collecting feedback during and after the draft version of the system has been offered to a group of users similar to the system’s intended users (Carliner, 2015)
When will the evaluation occur?	After the technical review and before the copy-editing editorial review.
Who will participate in the evaluation? What expertise do they bring?	All seven members of the L&D team (L&D Director, Logistics/ Client Coordinator, LMS Administrator, and four L&D Supervisors) will be invited to participate in the pilot test. They were selected because they are the intended users of the new performance management system.

<p>Procedure for conducting reviews?</p> <p>Drafts of materials needed for reviewers to conduct their reviews?</p>	<ul style="list-style-type: none"> <li>• Book the pilot test (reserve room, schedule time).</li> <li>• Invite pilot users from the group above and provide them with complete instructions and detailed guidance including setup instructions, visuals with notes, instructions for administering and debriefing PMS-related activities, closeout list</li> <li>• Provide pilot users access to the PMS and ask them to complete a full performance review cycle. Evaluations will not be recorded in the employees' files; however, the cycle is executed in its entirety from beginning to end, including all the steps that would be required if the system had actually been implemented. <ul style="list-style-type: none"> <li>○ Seek feedback from pilot users by debriefing after each part of the cycle</li> <li>○ Provide pilot users with level 1 evaluation (reaction)</li> <li>○ Request from pilot users an evaluation of ease of navigation, systems components and how they worked, intuitive of system functionalities and if form is aesthetically pleasing</li> </ul> </li> <li>• Prepare an action plan of what to do next with the comments</li> </ul>
<p>Guidelines that will be used to assess the accuracy of the draft?</p>	<p>The system content and activities must be presented in such a way that most users will be able to achieve the system's objectives. The instructions for activities must be clear. Some guiding questions:</p> <ul style="list-style-type: none"> <li>• Was the PMS easy to navigate? If not, please explain.</li> <li>• Were the instructions and prompts in the PMS clear to follow? If not, please explain.</li> <li>• Was the content well laid out/ visually appealing? If not, please explain.</li> <li>• Was the content presented in the PMS relevant/ up to date? If not, please explain.</li> <li>• Were all the buttons/ pages/ modules of the PMS functioning as expected? Please explain.</li> <li>• Which functionalities of the PMS did you find the most/ least useful? Please explain.</li> <li>• Would you use this PMS on a regular basis (weekly/ monthly/ quarterly?). If not, why not?</li> <li>• Do you have any additional comments/ suggestions for improvement to the PMS?</li> </ul>
<p>Documents to be drafted? (See Appendix 3)</p>	<ul style="list-style-type: none"> <li>• Invitation to participate</li> <li>• Online documents referring to how to proceed</li> <li>• Reminder about the pilot test</li> <li>• Thank you note</li> </ul>

## Summative Evaluation Plan

The purpose of the summative evaluation is to provide three assessments that will be used to evaluate the effectiveness of the *PerformYard* Performance Management System (PMS): Engagement, Individual Performance and Organizational Performance.

### Engagement Levels 1 and 2

These assessments focus on the user's perceptions and level of engagement with the Performance Management System (PMS) after 12 months. They will evaluate if the system's users are regularly and actively using the PMS to monitor, review, evaluate and promote actions related to ideal performance of their employees.

Using *PerformYard's* integrated Analytics and Reporting features, the following metrics will be assessed for Engagement:

- Number of times the PMS has been accessed per user (Reviewer vs. Reviewee)
- Time spent on the system per review cycle and per user (Reviewer vs. Reviewee)
- Number of fully completed performance reviews submitted per reviewer, and signed off by reviewee (% completion)
- Number of fully completed peer feedback reviews submitted per reviewer (% completion)
- Number of fully completed self-assessments submitted per reviewer (% completion)
- Number of SMART goals set and submitted per reviewer
- Number of SMART goals achieved by review (% achievement)
- Number of KPI and dashboard reports generated by per user (Reviewer vs. Reviewee)

These metrics (among others) will provide insight and answers to the following questions:

- Are L&D Supervisors regularly and accurately using all of the PMS's functionalities to monitor, review, and evaluate their language instructors to document if instructors are (Appendix 2: Sample Performance Review Form):
  - Applying lesson structure and standards with an industry focus?
  - Using MS Teams to effectively deliver interactive language lessons?



- Monitoring performance against lesson standards at the end of each contract?
- Recommending self-study learning activities to learners from the LMS?
- Engaging learners in online forums that offer a safe space for knowledge sharing?
- Making content contributions and suggestions for improvement of language lessons?
- Is the L&D Director regularly and accurately using all of the PMS's functionalities to monitor, review, and evaluate his L&D team to document if the Logistics/ Client Coordinator, LMS Administrator, and four L&D Supervisors are:
  - Coordinating and scheduling online language courses efficiently i.e., with no errors/ cancelations/ postponements?
  - Communicating up-to-date information effectively to instructors and the L&D team?
  - Updating and communicating learning content and access links to LMS?
  - Recognizing those who demonstrate innovative online teaching skills and contribute meaningfully to improving content?
- How satisfied are users with the effectiveness of *PerformYard* as a system/ software for performance review and appraisals?  
 (1) Not satisfied            (2)            (3) Somewhat satisfied            (4)            (5) Very satisfied
- How useful was *PerformYard* in facilitating the performance review and management process for reviewers/ reviewees?  
 (1) Not useful            (2)            (3) Somewhat useful            (4)            (5) Very useful
- How comfortable were users giving and receiving performance reviews/ appraisals BEFORE *PerformYard*?  
 (1) Not comfortable            (2)            (3) Somewhat comfortable            (4)            (5) Very comfortable
- How comfortable are users giving and receiving performance reviews/ appraisals AFTER using *PerformYard*?  
 (1) Not comfortable            (2)            (3) Somewhat comfortable            (4)            (5) Very comfortable

The best thing about the *PerformYard* PMS is \_\_\_\_\_

The one thing that could be done to improve the *PerformYard* PMS would be \_\_\_\_\_

### Individual Performance Levels 2 and 3

These assessments focus on the level of performance by evaluating if performers are accomplishing the performance objectives after 12 months. After completion of each review cycle (quarterly, semi-annually, and annually), data and results exported from the PMS will help gauge if the PMS and new review appraisal process was actually able to help online language instructors and the L&D team to perform more effectively and efficiently to improve client satisfaction ratings with online language lessons?

- Did the performers (online language instructors and the L&D team) achieve the required minimum 90% client satisfaction rating? (*Source: client course satisfaction ratings submitted by individual client learners after course completion*)
- Did the performers increase the effectiveness of lessons through:
  - Interactive and collaborative language lessons with a minimum of 80% interactive whiteboard usage rate when teaching (*Source: Microsoft Teams Interactive Whiteboard Analytics reports*)
  - Better participation of corporate learners in online classes and knowledge sharing forums with a minimum of 80% participation rate (*Source: Microsoft Teams meeting attendance reports and comments posted to online forums*)
  - Development, management, communication, update, and use of LMS content on a regular basis? Learners should have used the LMS for 60 minutes per week outside of class time. (*Source: LMS usage and analytics reports*)
- Did the performers reduce lesson delays and cancellations to the required minimum of less than 10% cancellation/ postponement rate? (*Source: Microsoft Teams meeting attendance reports*)

### Organizational Performance Level 4

This assessment measures the organizational benefits of improved performance resulting from the *PerformYard* PMS, using a business metric to see if the organization's business objective is being achieved: to generate 10% more revenue in the next 12 months by increasing the number of language teaching contracts (both new contracts and renewals) awarded by corporate clients to ABC. What contribution to these business results did the successful development and implementation of *PerformYard* make?

This cost-effective PMS has the potential of making a highly positive business impact on the organization as it not only covers steps 1 and 2 of the Intervention Roadmap from Appendix 1, i.e., to build a Performance Management System and Feedback systems, but also lays a solid foundation for future key performance improvement initiatives such as the Recognition and Reward program (step 5) and Job Enrichment program (step 6) to be rolled out in September – December 2023 (see Appendix 1). Due to its multidimensional functionality and benefits, *PerformYard* is expected to contribute by at least 50% to the achievement of the above business objective:

Cost of <i>PerformYard</i> PMS =	\$15,000
Projected Value of PMS =	\$27,500 (5% increase of \$550,000 annual revenue)
Expected Return on Investment (ROI) =	<b>83%</b> $(\$27,500 - \$15,000) / \$15,000 \times 100\%$

An 83% ROI in the first year is good for the *PerformYard* PMS since it:

- Offers the organization a flexible cloud-based solution and a simple, streamlined process to build out a performance review strategy, including annual reviews, quarterly goals, 360-degree and project-based reviews, feedback, and cascading goals.
- Paves the way for the rest of the Intervention Roadmap with the future introduction of financial and non-financial incentives for performance, and the creation of clear job paths and upskilling/ reskilling initiatives, both in total alignment with the PMS.

## Intervention 2: Process and Job Redesign

The second intervention selected from the Intervention Roadmap (Appendix 1) of the High-Level Design analysis was a combined process and job redesign (steps 3 and 4), as both affect the same stakeholders. To reduce process bottlenecks for better, more efficient workflow, there will be a restructuring of the course scheduling and communication process, and a revision of the LMS update cycle and communication. Interfering tasks for L&D team members will be eliminated or reassigned and clearly defined job expectations will be set. These job expectations will mirror the performance standards for the respective role in the PMS, to ensure complete alignment of the new system and process. The process and job redesigns will be formalized and documented in process maps and updated job descriptions, then made available to process stakeholders as a reference document.

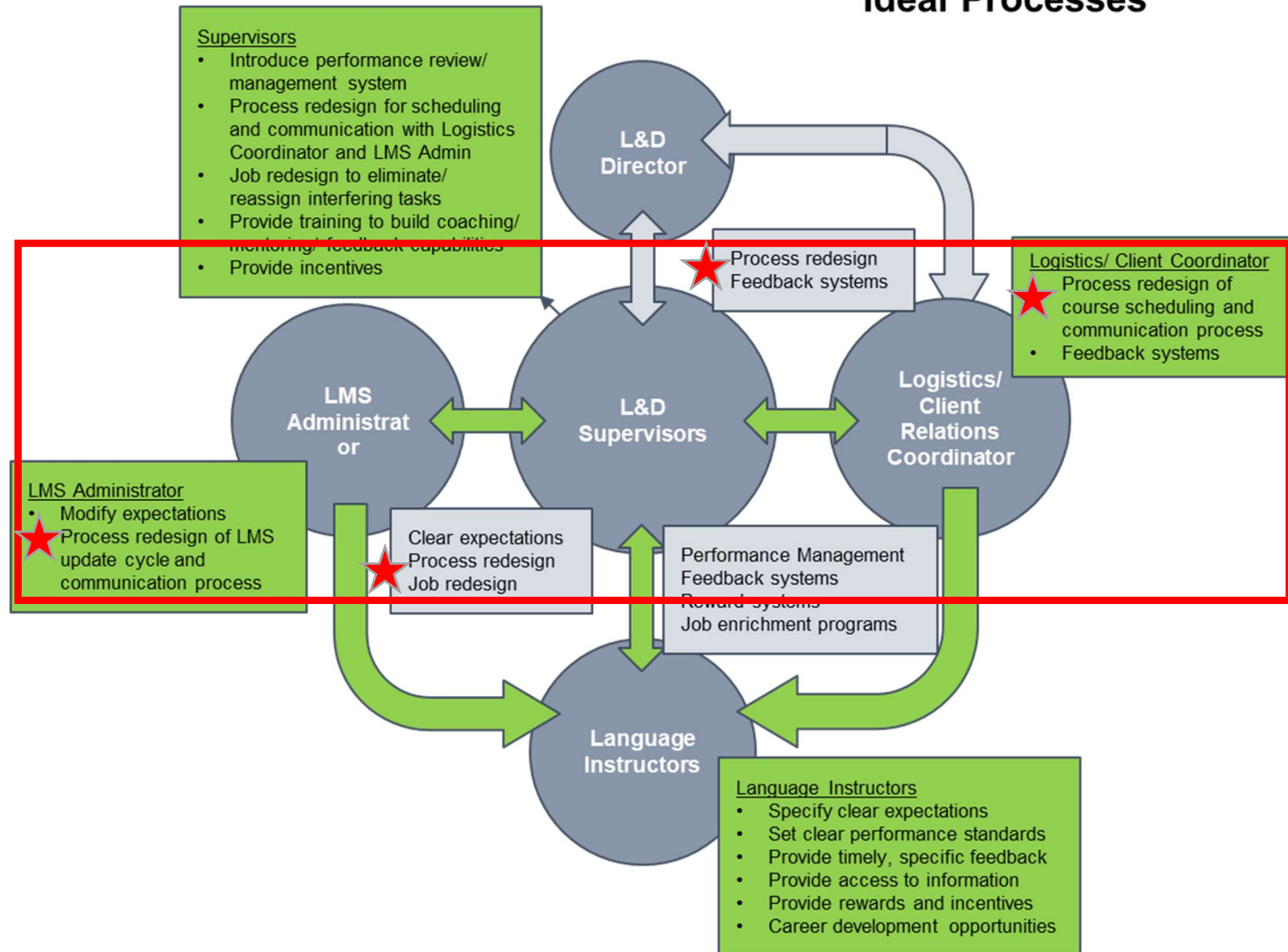
### Overview and Description

<b>Sponsor</b>	The President of ABC language school
<b>Users</b>	L&D team: Logistics/ Client Coordinator, LMS Administrator, L&D Supervisors
<b>Performance objectives addressed</b>	<ul style="list-style-type: none"> <li>Given client and instructor availabilities, the Logistics Client Relations Coordinator schedules online classes for clients and instructors, in coordination with supervisors, and with less than 10% cancellation/ postponement rate.</li> <li>Given up-to-date content from L&amp;D supervisors, LMS Administrator performs LMS updates at least once a month.</li> </ul>
<b>Genre or form</b>	<ul style="list-style-type: none"> <li>Format: Process maps and job descriptions</li> <li>Clear visuals and easy-to-understand descriptions of the process and its stakeholders, elimination of counterproductive procedures.</li> <li>Clearly defined roles and descriptions including tasks and duties, deliverables, processes, timelines, team members, qualifications etc.</li> </ul>
<b>Communication medium</b>	<ul style="list-style-type: none"> <li>PDF - Online download – Cloud Based Access</li> <li>Advantages: easy access for process stakeholders, individual employees, and their supervisor/ manager (job descriptions). Approved processes, job roles, duties, responsibilities, and tasks are formally listed as binding Read-only documents.</li> </ul>

<b>Timeline</b>	May – July 2023
<b>Description</b>	<ul style="list-style-type: none"> <li>• Reasons for choosing intervention: <ul style="list-style-type: none"> <li>• To standardize the course scheduling and schedule communication process</li> <li>• To establish clearly defined LMS update cycles and communication process</li> <li>• To eliminate redundant tasks leading to task interferences that affect performance</li> </ul> </li> <li>• Design: <ul style="list-style-type: none"> <li>• Step-by-step Process One Pager – downloadable PDF from shared folder (Writing style: clear, concise, and visual/ illustrative, flowcharts/ diagrams)</li> <li>• Employee Job Description – downloadable PDF in employee PMS profile (Writing style: (business) formal, succinct, and detailed)</li> </ul> </li> </ul>
<b>Material to develop</b>	<ul style="list-style-type: none"> <li>• Process maps (created in PowerPoint, then converted into PDF)</li> <li>• Revised Job Descriptions (edited in Word, then converted into PDF)</li> </ul>

Process Maps

Ideal Processes



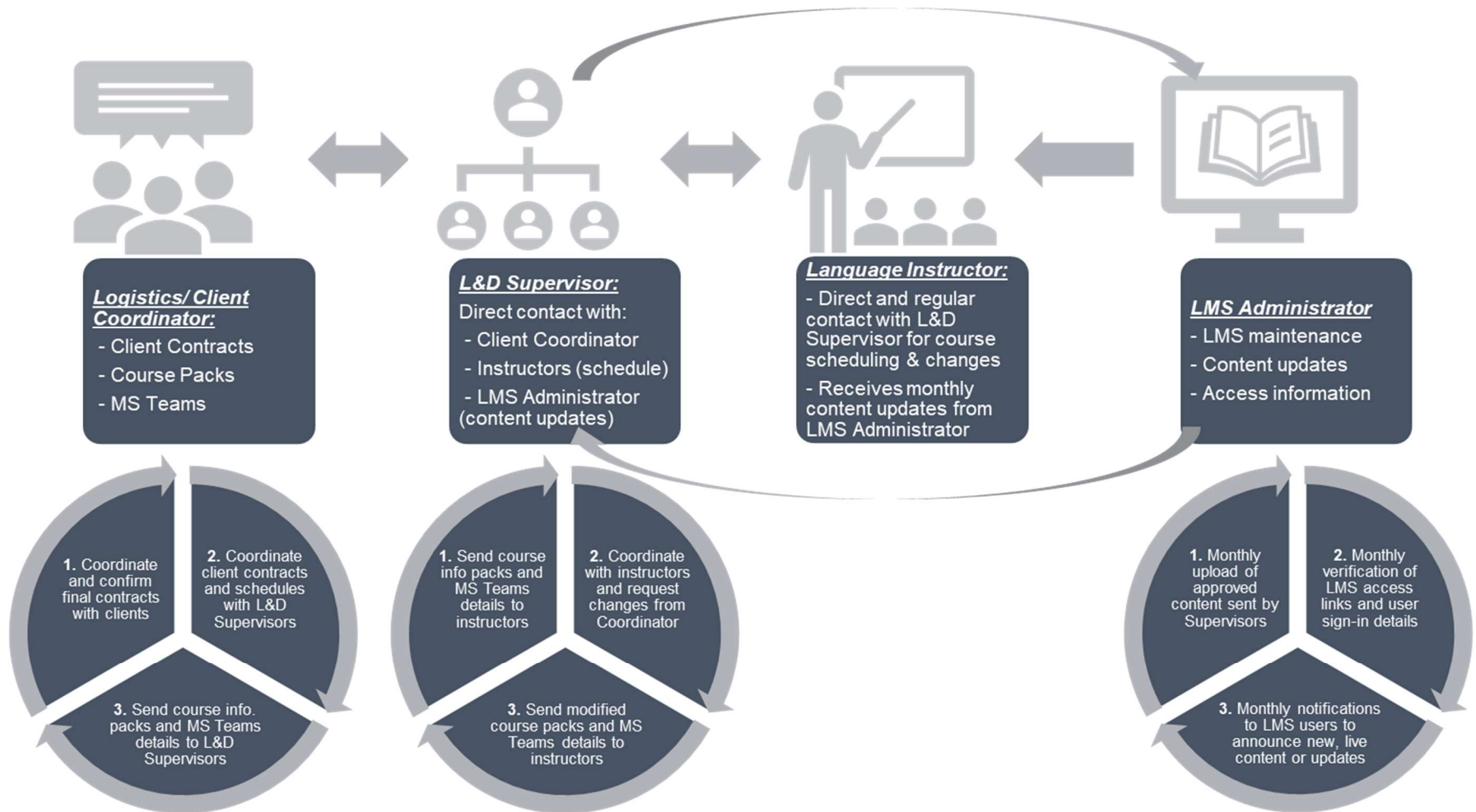
From the 'Ideal Processes' map of the PNA, it is evident that the process and job redesign initiatives specifically affect the Logistics/ Client Coordinator, LMS Administrator, and L&D Supervisors. Missing, interfering, or redundant tasks within this group (in red) are creating process bottlenecks and leading to faulty scheduling, communication, and LMS update cycles.

Process bottlenecks and task interferences/ redundancies to be removed:

- Logistics Client Relations Coordinator currently coordinates language teaching contract proposals between clients and language instructors directly: schedules online language classes for clients and communicates the schedules, virtual classroom information and course packs directly to instructors without involving L&D supervisors. **L&D supervisors, who are currently out of this scheduling and communication loop must be included in the process:**
  - The Logistics Client Relations Coordinator must coordinate and confirm clients and contract periods/ times with L&D supervisors first before sending them the course information packs. **Supervisors will forward the packs to instructors.**
  - Logistics Client Relations Coordinator must schedule online classes in designated MS teams accounts and communicate meeting details to L&D supervisors. **Supervisors will forward the meeting details to instructors.**
  
- L&D Supervisors currently modify their instructors' schedules themselves (if necessary) and communicate these schedule changes to language instructors, without involving the Logistics Client Relations Coordinator (who created the original schedule). **The Client Relations Coordinator, currently out of this schedule modification loop, must be included in the process:**
  - L&D Supervisors must discuss and confirm schedules with online language instructors before the start of the session.
  - L&D Supervisors must coordinate schedule changes with Logistics Client Relations Coordinator before the start of the session. L&D Supervisors are no longer allowed to modify schedules themselves as this is an interfering task that causes process bottlenecks, so **the schedule modification task will be reassigned from the L&D Supervisor to the Logistics Client Relations Coordinator.** This streamlines the process and makes it more efficient for two reasons:
    - Now all scheduling and schedule modification is overseen by a single person, the Client Relations Coordinator
    - And all instructor communication and coordination are managed by a single person, the L&D Supervisor
  - L&D Supervisors must discuss session and learner progress with instructors during and after sessions.
  
- LMS Administrator currently manages content in the LMS and performs updates periodically. However due to an irregular update cycle and in-existent communication process, LMS users are not notified of newly uploaded content and most of the time, the LMS does not get accessed and used. To increase LMS participation, **LMS Administrator will:**

- Update learning content approved by L&D Supervisors and verify access links at once to twice a month
- Send corresponding notifications to LMS users to communicate updated access information to new, live content.

New L&D Team Process Map





## Job Descriptions

To ensure that efficient workflow in the above illustrated process is maintained, clearly defined job expectations must be set and documented, and interfering tasks for L&D team members must be officially reassigned to eliminate redundancies and process bottlenecks. These changes will be formalized in updated job descriptions for the affected roles within the L&D team. Please see Appendix 4 for draft updated job descriptions for L&D Supervisor and LMS Administrator (newly added tasks highlighted in **bold**).

## Formative Evaluation Plan

The Formative Evaluation Plan for the new L&D process map includes three types of reviews: (1) a technical review, (2) an editorial review, and (3) a pilot test. Details about the reviews of the new process map are provided in the tables below.

### REVIEW 1. TECHNICAL REVIEW

Purpose of the evaluation	The purpose of the technical review is to ensure that the content of the L&D process map is accurate, which means that the process information that was used in the map is up-to-date, factually correct, and thoroughly presented.
When will the evaluation occur?	After development, before pilot testing (May 2023)
Who will participate in the evaluation? What expertise to they bring?	Logistics/ Client Coordinator, L&D Supervisor, LMS Administrator as they are the main stakeholders directly involved in the process.
Procedure for conducting reviews?  Drafts of materials needed for reviewers to conduct their reviews?	<ul style="list-style-type: none"> <li>• By email, send a cover letter that provides complete instructions and detailed guidance to the reviewers. Include the new L&amp;D process map as an attachment.</li> <li>• Receive comments from the three reviewers.</li> <li>• Itemize the comments based on importance</li> <li>• Hold a review meeting with the reviewers (if needed) to resolve any unclear comments.</li> <li>• Prepare an action plan of what to do next with the comments.</li> </ul>

Guidelines that will be used to assess the accuracy of the draft?	<p>The content of the L&amp;D process map must be accurate: up-to-date, factually correct, and thoroughly presented. Some guiding questions for the technical review:</p> <ul style="list-style-type: none"> <li>• Is the process map clear and intuitive to read?</li> <li>• Is the content of the process map precise and relevant?</li> <li>• Is the content of the process map presented in a clear, logical and comprehensive manner?</li> <li>• Are the different steps of the process map (tasks, feedback loops etc.) executable?</li> <li>• Do you have any additional comments/ suggestions for improvement?</li> </ul>
Documents to be drafted?	<ul style="list-style-type: none"> <li>• Cover letter</li> <li>• Reminder</li> <li>• Thank you note to the reviewer</li> <li>• Invitation to the reviewer for a review meeting</li> </ul>

## REVIEW 2. EDITORIAL REVIEW (DEVELOPMENTAL AND COPY-EDITING)

Purpose of the evaluation?	<p>The purpose of the developmental review is to evaluate the presentation of the content to the process stakeholders. The review focuses on the organization and clarity of the materials.</p> <p>The purpose of the copy-editing review is to: (a) fix any issues in the program related to grammar, spelling, and punctuation, and (b) ensure compliance to the organization's style guide and branding.</p>
When will the evaluation occur?	After development, before pilot testing (May 2023)
Who will participate in the evaluation? What expertise to they bring?	<p><u>Developmental review:</u> Peer performance consultant who has not yet experienced the new process, to bring a fresh perspective/ view to it.</p> <p><u>Copy-editing review:</u> Content specialist who is responsible for copy-editing all materials that are produced for corporate training and development programs.</p>
Procedure for conducting reviews?	<p>Developmental Review</p> <ul style="list-style-type: none"> <li>• By email, send a cover letter that provides complete instructions and detailed guidance to the reviewer. Include the new L&amp;D process map as an attachment.</li> <li>• Receive comments from the reviewer.</li> </ul>

<p>Drafts of materials needed for reviewers to conduct their reviews?</p>	<ul style="list-style-type: none"> <li>• Itemize the comments based on importance</li> <li>• Hold a review meeting with the reviewer (if needed) to resolve any unclear comments.</li> <li>• Prepare an action plan of what to do next with the comments.</li> </ul> <p>Copyediting review:</p> <ul style="list-style-type: none"> <li>• By email, send a cover letter that provides complete instructions and detailed guidance to the reviewer. Include the new L&amp;D process map as an attachment.</li> <li>• Receive comments from the reviewer.</li> <li>• Discuss any unclear comments with the reviewer (if needed)</li> <li>• Integrate any necessary copyedits into the final draft</li> </ul>
<p>Guidelines that will be used to assess the accuracy of the draft?</p>	<p><u>Developmental review:</u> The L&amp;D process map must be organized and clear. It must flow easily between units and make sense as a complete package/ system. Written text, including visuals, must convey the key messages to users.</p> <p><u>Copy-editing review:</u> The L&amp;D process map must follow proper rules for grammar, punctuation, and spelling. The L&amp;D process map must adhere to the organization's style guide (where applicable) which includes logos, branding, and fonts.</p>
<p>Documents to be drafted?</p>	<ul style="list-style-type: none"> <li>• Cover letter (developmental and copyediting)</li> <li>• Reminder (developmental and copyediting)</li> <li>• Thank you note (developmental and copyediting)</li> <li>• Invitation to review meeting (developmental only)</li> </ul>

### REVIEW 3. PILOT TEST

<p>Purpose of the evaluation?</p>	<p>The purpose of the pilot test is to identify aspects of the L&amp;D process map that may need improvement. This is done by collecting feedback during and after the draft version of the process map has been offered to a group of users similar to the process's intended users.</p>
<p>When will the evaluation occur?</p>	<p>After the technical review and before the copy-editing editorial review.</p>
<p>Who will participate in the evaluation? What</p>	<p>Logistics/ Client Coordinator, L&amp;D Supervisor, LMS Administrator as they are the main stakeholders directly involved in the process and the intended users of the new L&amp;D process map.</p>

expertise do they bring?	
<p>Procedure for conducting reviews?</p> <p>Drafts of materials needed for reviewers to conduct their reviews?</p>	<ul style="list-style-type: none"> <li>• Book the pilot test (reserve room, schedule time).</li> <li>• Invite pilot users from the group above and provide them with detailed instructions</li> <li>• Allow pilot users access to execute all the steps from the L&amp;D process map <ul style="list-style-type: none"> <li>○ Seek feedback from pilot users by debriefing after each part of the cycle</li> <li>○ Provide pilot users with level 1 evaluation (reaction)</li> <li>○ Request from pilot users an evaluation of ease of use, process components and how they worked, intuitiveness, functionality and if form is aesthetically pleasing</li> </ul> </li> <li>• Prepare an action plan of what to do next with the comments</li> </ul>
Guidelines that will be used to assess the accuracy of the draft?	<p>The process map must be presented in such a way that all process stakeholders will be able to achieve the process objectives. The instructions for activities must be clear. Some guiding questions:</p> <ul style="list-style-type: none"> <li>• Was the map easy to navigate? If not, please explain.</li> <li>• Were the instructions on the map clear to follow? If not, please explain.</li> <li>• Was the content well laid out/ visually appealing? If not, please explain.</li> <li>• Was the content presented in the map relevant/ up to date? If not, please explain.</li> <li>• Which parts of this process map did you find the most/ least useful? Please explain.</li> <li>• Would you use this process map on a regular basis (daily/ weekly/ monthly?). If not, why not?</li> <li>• Do you have any additional comments/ suggestions for improvement of the process map?</li> </ul>
Documents to be drafted?	<ul style="list-style-type: none"> <li>• Invitation to participate</li> <li>• Online documents referring to how to proceed</li> <li>• Reminder about the pilot test</li> <li>• Thank you note</li> </ul>

### Summative Evaluation Plan

The purpose of the summative evaluation is to provide assessments that will be used to evaluate the effectiveness of the L&D process map: Engagement, Individual Performance and Organizational Performance.

## Engagement Levels 1 and 2

These assessments focus on the process stakeholders' perceptions and level of engagement with the process map, and the process itself, after 12 months. They will evaluate if the process stakeholders are regularly and correctly executing the tasks listed in the process map and thereby increasing actions related to ideal performance.

- Are the Logistics/ Client Coordinator, LMS Administrator, and four L&D Supervisors:
  - Coordinating and scheduling online language courses efficiently i.e., with no errors/ cancelations/ postponements?
  - Communicating up-to-date information effectively to instructors and the L&D team?
  - Updating and communicating learning content and access links to LMS?
  
- How satisfied are stakeholders with the effectiveness of the new L&D process map?  
 (1) Not satisfied            (2)            (3) Somewhat satisfied            (4)            (5) Very satisfied
- How useful was the new L&D process map in facilitating the scheduling, communication and LMS update processes?  
 (1) Not useful            (2)            (3) Somewhat useful            (4)            (5) Very useful
- How comfortable were stakeholders with scheduling, communication and LMS update processes BEFORE the map?  
 (1) Not comfortable            (2)            (3) Somewhat comfortable            (4)            (5) Very comfortable
- How comfortable are stakeholders with scheduling, communication and LMS update processes AFTER using the map?  
 (1) Not comfortable            (2)            (3) Somewhat comfortable            (4)            (5) Very comfortable

The best thing about the L&D process map is \_\_\_\_\_

The one thing that could be done to improve the L&D process map would be \_\_\_\_\_

**Individual Performance Levels 2 and 3**

These assessments focus on the level of performance by evaluating if performers are accomplishing the performance objectives after 12 months. After completion of each course scheduling and LMS update cycle, the results will help gauge if the L&D process was actually able to help online language instructors and the L&D team to perform more effectively and efficiently to improve client satisfaction ratings with online language lessons.

- Did the performers (Logistics/ Client Coordinator, L&D Supervisor, LMS Administrator) achieve the required minimum 90% client satisfaction rating? (*Source: client course satisfaction ratings submitted by individual client learners after course completion*)
- Did the performers reduce lesson delays and cancellations to the required minimum of less than 10% cancellation/ postponement rate? (*Source: Microsoft Teams meeting attendance reports*)

**Organizational Performance Level 4**

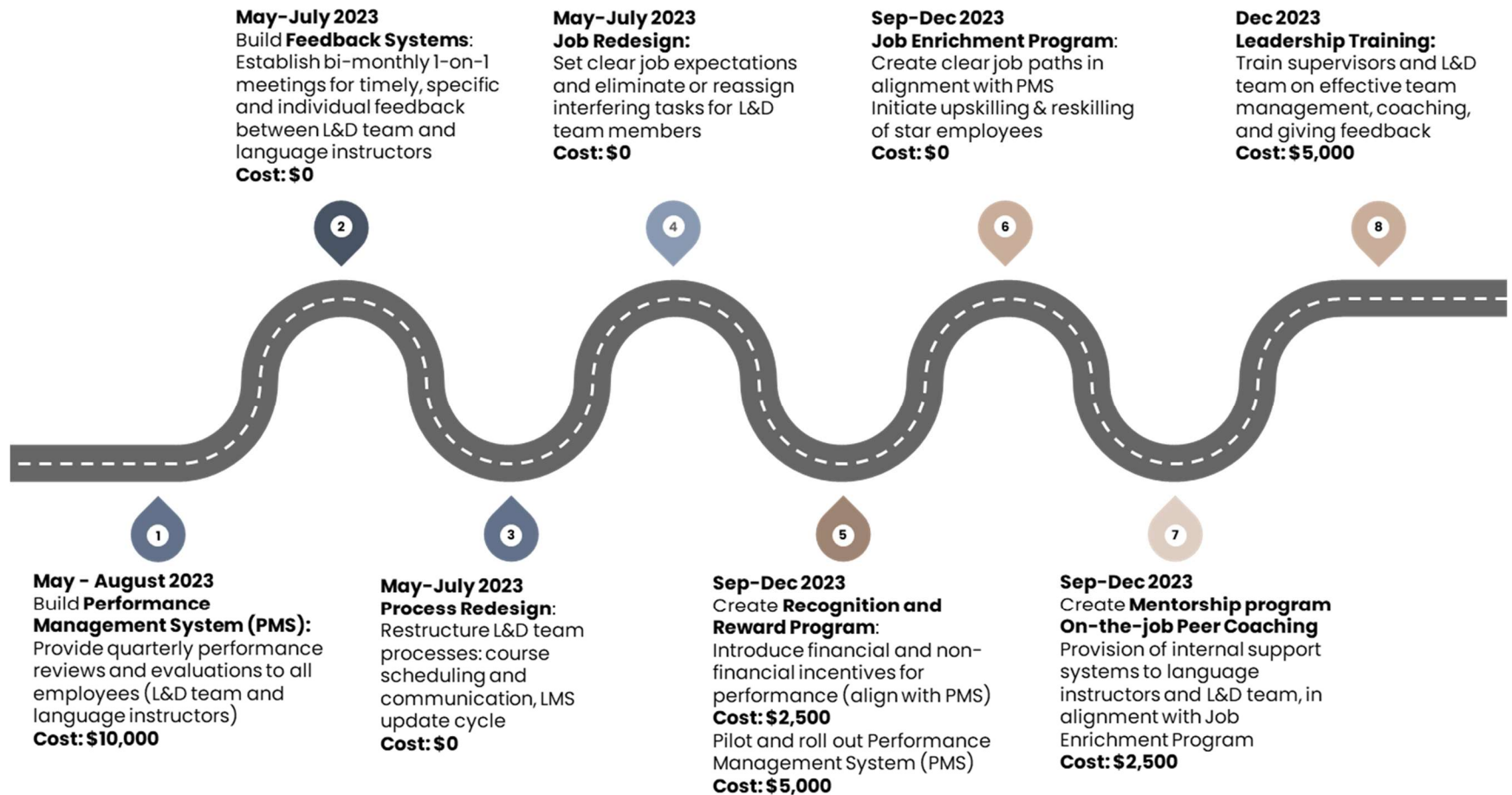
An ROI assessment of the organizational benefits of improved performance resulting from the L&D process map is not necessary as process and job redesign is the most cost-effective of all initiatives, costing \$0, but also with the potential of making a highly positive business impact on the organization.

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## APPENDICES

### Appendix 1: Intervention Roadmap





## Appendix 2: Sample Performance Review Form – Instructors

Performance objective addressed: Language instructors are achieving the required 90% client satisfaction rating with online language lessons

INSTRUCTOR: LEARNER: LESSON LEVEL:		Rating Scale			
DATE: TIME:		1 - Fully Achieved			
EVALUATOR:		2 - Almost Achieved			
		3 - Somewhat Achieved			
		4 - Not Achieved			
Online Lesson	Description	Rationale	Rating	Comments	Performance Objectives Addressed
<b>Opening</b>	<p>Elements:</p> <ul style="list-style-type: none"> <li>- Warm-up following the Instructor Aids guide</li> <li>- Introduction - Introduce the lesson</li> <li>- Needs Analysis to find out specific needs of the learner and use them as a theme throughout the lesson where appropriate.</li> </ul>	<ul style="list-style-type: none"> <li>- Warm-up: Conversation intended to help the learner move to a neutral emotional state and settle into the language lesson</li> <li>- Introduction of topic and needs analysis</li> <li>- The topic of the lesson should be clear for the learner and facilitation of the session should be geared towards the learner's specific need to make it as relevant and useful to the learner as possible</li> </ul>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Using MS Teams to effectively deliver interactive and collaborative language lessons with minimum 80% interactive whiteboard usage rate.</li> </ul>
<b>Structure</b>	<p>All language lessons follow the complete Presentation, Practice, and Production (PPP) structure. At least one-third of the lesson should be spent on Production. The instructor uses a logical structure that the learner can follow.</p>	<p>Following the set structures of each lesson will result in consistency and ensure completion. Using the full PPP structure ensures that we provide enough time for learners to apply what they've learned during the lesson. This helps increase the learner's confidence when using the language skill they learned in real life situations.</p>			<p>Language instructors are applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</p>
<b>Time Management</b>	<ul style="list-style-type: none"> <li>- Calls the learner on time.</li> <li>- Structure:</li> <li>- Opening: approximately 5 minutes</li> <li>- Refer to the Instructor Aid for the specific structure and timing set for each lesson. All durations set for each section are approximate.</li> <li>- Production should be at least 30 minutes long.</li> <li>- Closing: Approximately 8 minutes.</li> <li>- Ends the lesson on time. If there are uncontrollable circumstances, these should be noted on the log.</li> </ul>	<ul style="list-style-type: none"> <li>- Learners should not be made to wait for their lessons. This is part of professionalism.</li> <li>- Keeping the warm up conversation close to 5 minutes or less, when possible, will help to reserve as much of the lesson time as possible for collaboration toward learning goals</li> <li>- The goal of lessons is to get learners to express themselves hence at least 30 minutes is spent on Production.</li> <li>- Learners expect to receive the full duration of the lesson. It is our responsibility to provide what is due them in terms of value of investment.</li> </ul>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Using MS Teams to effectively deliver interactive and collaborative language lessons with minimum 80% interactive whiteboard usage rate.</li> </ul>
<b>Teaching Strategies</b>	<ul style="list-style-type: none"> <li>- Manipulates the material by employing appropriate strategies. Unique learner needs noted during needs analysis should be used as a theme throughout the lesson.</li> <li>- As much as possible, the learner should not be asked to read long passages during the lesson.</li> <li>- Effectively directs the flow of the lesson consistent with the lesson objectives.</li> <li>- Learner talk time should be greater than instructor talk time (TTT &lt; LTT).</li> </ul>	<ul style="list-style-type: none"> <li>- Because one of our core values is to personalize training for every learner, instructors need to be able to skillfully manipulate lesson materials and activities to meet the specific needs of individual learners.</li> <li>- Because we value every learner's unique personality, cultural background and learning style, it is very important that instructors understand and follow the learner's correction preference.</li> </ul>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Using MS Teams to effectively deliver interactive and collaborative language lessons with minimum 80% interactive whiteboard usage rate.</li> <li>- Increasing participation of corporate learners in online classes and knowledge sharing forums with minimum 80% participation rate</li> </ul>
<b>Accuracy in the lesson</b>	<p>Gives accurate and comprehensible explanations, and responds accurately when a learner asks if a statement is correct to help the learner achieve the lesson objectives.</p>	<p>Learners rely on instructors as experts in teaching languages. Therefore, explanations and corrections offered by instructors should be accurate.</p>			<p>Language instructors are applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</p>
<b>Correction</b>	<p>Prioritizes spotting and correcting the mistakes related to the objectives of the lesson, generally focuses on mistakes at or below the learner's level, and repeated mistakes. Effectively elicits for corrections (elicits appropriately/when possible and does not overly elicit). Effective corrections cause the learner to change his use of the language to the acceptable form.</p>	<p>Experience is one of the most powerful teachers for adult learners. Providing consistent, effective correction is one of the fundamental tools instructors can use to help learners gain experience and language proficiency. In addition, eliciting can also enhance effectiveness of corrections. Appropriate and effective eliciting keeps the learner in the stretch zone and creates powerful learning experiences.</p>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Using MS Teams to effectively deliver interactive and collaborative language lessons with minimum 80% interactive whiteboard usage rate.</li> </ul>
<b>Closing</b>	<p>The last 8 minutes or so should include the following:</p> <ul style="list-style-type: none"> <li>- Give feedback.</li> <li>- Ask for questions.</li> <li>- Summarize corrections.</li> <li>- Highlight the most relevant words or expressions learned (i.e., the ones that the learner is most likely to use again).</li> <li>- Collaborate with the learner on a plan for application. (e.g., Ask the learner about his/her next meeting, and how he/she can prepare for it using the expressions learned today.)</li> </ul>	<p>Lessons have to be ended in such a way that the topic discussed is evidently very clear for the learner. This is why learners should be asked for questions and corrections should be summarized to make sure that there are no points left pending. Highlighting of the learning points demonstrates to the learner that the lesson was a success. Collaborating with the learner for an application plan helps motivate the learner to use what was learned in real-life situations for continued progress.</p>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Using MS Teams to effectively deliver interactive and collaborative language lessons with minimum 80% interactive whiteboard usage rate.</li> <li>- Increasing participation of corporate learners in online classes and knowledge sharing forums with minimum 80% participation rate</li> </ul>
<b>Performance Feedback</b>	<p>Gives balanced (strengths and areas for improvement) and specific feedback on the learner's performance based on the objective/s of the lesson. Where possible, this feedback should be linked to results of the needs analysis completed at the beginning of the lesson. The feedback should accurately reflect the learner's performance in the lesson.</p>	<p>Instructors can maintain a high level of motivation and engagement for learners by providing balanced performance feedback in every lesson.</p>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Using MS Teams to effectively deliver interactive and collaborative language lessons with minimum 80% interactive whiteboard usage rate.</li> </ul>
<b>Homework</b>	<ul style="list-style-type: none"> <li>- Appropriate homework objective/s are selected. Instructor suggests and/or gives and explains a topic/activity that tackles the learner's needs and objectives.</li> <li>- Instructors will create an online community that offers a safe space for learners for knowledge sharing, and encourage learner participation as an independent learning activity once a week.</li> </ul>	<p>Adults are most motivated to learn when they perceive that the learning will help them to confront a need or accomplish a relevant task at work.</p>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Increasing self-study learning activities accessed by learners in LMS to the required minimum of 60 minutes per week outside of class time.</li> <li>- Increasing participation of corporate learners in online classes and knowledge sharing forums with minimum 80% participation rate</li> </ul>
<b>Blended Standard</b>	<ul style="list-style-type: none"> <li>- At any time during the lesson, makes appropriate mention of completed self-practice, or if the learner hasn't done self-practice, mentions or encourages self-practice in the future.</li> <li>- Instructors will create an online community that offers a safe space for learners for knowledge sharing, and encourage learner participation as an independent learning activity once a week.</li> </ul>				<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Applying lesson structure and standards with an industry focus (with minimum 80% accuracy)</li> <li>- Increasing self-study learning activities accessed by learners in LMS to the required minimum of 60 minutes per week outside of class time.</li> <li>- Increasing participation of corporate learners in online classes and knowledge sharing forums with minimum 80% participation rate</li> </ul>
<b>Content Contribution</b>	<p>Language instructors make content contributions and suggestions for improvement of language lessons at the end of each teaching contract.</p> <ul style="list-style-type: none"> <li>- Discuss new improved content ideas and contributions with supervisors at the end of each teaching contract.</li> <li>- Communicate approved content contributions to LMS administrator at the end of each teaching contract.</li> </ul>	<p>Our clients expect us to deliver the most up-to-date and relevant learning content, both for live training through telephone lessons and self-practice through eLearning. It is critical to take into account the clients needs, preferences and requests and enhance our learning content to better align it with current markets, trends and industries.</p>			<p>Language instructors are:</p> <ul style="list-style-type: none"> <li>- Regularly making content contributions to improve language lessons</li> </ul>
<b>EVALUATOR'S COMMENTS</b>					

### Appendix 3: Materials for Formative Evaluation

#### *Correspondence for the Technical review*

Cover letter	<p>Subject line: Technical review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt;L&amp;D Director&gt;,</p> <p>The President of the ABC has asked me to reach out to you for a review of our new Performance Management System, <i>PerformYard</i>. This new software will enable our managers and supervisors to offer annual, quarterly, and monthly performance reviews to their direct reports, in order to continuously monitor and improve employee performance.</p> <p>Thanks to your extensive work experience in corporate training, development, and performance appraisal systems, you are the ideal candidate for providing feedback on this new system. I am looking to ensure that the content and materials provided are factually correct, up-to-date, and properly presented.</p> <p>Attached are the complete instructions and detailed notes on <i>PerformYard</i>.</p> <p>Would it be possible to provide me with your feedback by this date &lt;DEADLINE&gt;?</p> <p>Thank you and I look forward to receiving your feedback.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Reminder	<p>Subject line: Reminder: Technical review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt;L&amp;D Director &gt;,</p> <p>Thank you again for agreeing to participate in the technical review of the '<i>PerformYard</i> Performance Management Software.' This is a gentle reminder that your feedback is due by &lt;DEADLINE&gt;. Please let me know if this deadline still works for you.</p> <p>Thank you again for your collaboration in this project.</p>

	<p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Thank you note	<p>Subject line: RE: Reminder, Technical Review of '<i>PerformYard</i> Performance Management System' Dear &lt;L&amp;D Director&gt; ,</p> <p>Thank you for your feedback on the course. I will be reviewing your comments and making changes where appropriate.</p> <p>Should anything be unclear within your comments, I will reach out for clarification, with the possibility of a review meeting. I checked our Outlook calendars and reserved on &lt;DATE &gt; from &lt;TIME 1&gt; until &lt;TIME 2&gt;. for an online meeting on ZOOM. I will let you know three (3) days before &lt;DATE &gt; if the meeting is indeed needed. Please let me know if this time works for you.</p> <p>Thank you again for your collaboration in this project.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Invitation to review meeting	<p>Subject line: Review meeting about '<i>PerformYard</i> Performance Management System.'</p> <p>Dear &lt; L&amp;D Director &gt; ,</p> <p>Thank you for your feedback, it is extremely helpful, and I look forward to making the suggested improvements. However, I do have questions about some of the comments you made so I would like to take advantage of the time we both reserved in our calendars, as per my last email.</p> <p>I am looking forward to our discussion on &lt;DATE&gt; from &lt;TIME 1&gt; until &lt;TIME 2&gt; on Zoom.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>

*Correspondence for the Developmental and Editorial reviews*

Cover letter	<p>Subject line: Developmental review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt;Peer Performance Consultant&gt;,</p> <p>As discussed, here is the first version of the '<i>PerformYard</i> Performance Management Software' for your review. Attached are the complete instructions and detailed notes on <i>PerformYard</i>.</p> <p>I am looking for your feedback on the following areas: (1) platform organization and clarity, (2) flow of content between units, and (3) the strength of the text, visuals, activities, and assessments in conveying key takeaways to learners.</p> <p>Would it be possible to provide me with your feedback by this date &lt;DEADLINE&gt;?</p> <p>Thank you and I look forward to receiving your feedback.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Reminder	<p>Subject line: Reminder: Developmental review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt;Peer performance consultant&gt;,</p> <p>Thank you once again for agreeing to participate in the developmental review of '<i>PerformYard</i> Performance Management System.'</p> <p>This is a gentle reminder that your feedback is due by &lt;DEADLINE&gt;. Please let me know if this deadline still works for you.</p> <p>Thank you again for your collaboration in this project.</p> <p>Best regards, Ehab Rashid Performance Consultant</p>

Thank you note	<p>&lt;CONTACT INFO&gt;</p> <p>Subject line: RE: Reminder, Developmental Review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt;Peer performance consultant&gt;,</p> <p>Thank you for your feedback on the course. I will be reviewing your comments and making changes where appropriate.</p> <p>Should anything be unclear within your comments, I will reach out for clarification, with the possibility of a review meeting. I checked our Outlook calendars and reserved on &lt;DATE &gt; from &lt;TIME 1&gt; until &lt;TIME 2&gt;. for an online meeting on ZOOM. I will let you know three (3) days before &lt;DATE &gt; if the meeting is indeed needed. Please let me know if this time works for you.</p> <p>Thank you again for your collaboration in this project.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Invitation to review meeting	<p>Subject line: Review meeting about '<i>PerformYard</i> Performance Management System.'</p> <p>Dear &lt;Peer performance consultant&gt;,</p> <p>Thank you for your feedback, it is extremely helpful, and I look forward to making the suggested improvements. However, I do have questions about some of the comments you made so I would like to take advantage of the time we both reserved in our calendars, as per my last email.</p> <p>I am looking forward to our discussion on &lt;DATE&gt; from &lt;TIME 1&gt; until &lt;TIME 2&gt; on Zoom.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>

Cover letter	<p>Subject line: Copyediting review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt;Content specialist&gt;,</p> <p>I hope you are well. As you may know, I have been working on the new <i>PerformYard</i> Performance Management System.' Attached are the complete instructions and detailed notes on <i>PerformYard</i> for your review.</p> <p>I am looking for your corrections in the following areas: grammar, spelling, and punctuation, as well as confirming that I have followed the ABC style guide, as well as properly applied all logos and branding.</p> <p>Would it be possible to provide me with your feedback by &lt;DEADLINE&gt;?</p> <p>Thank you and I look forward to receiving your feedback.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Reminder	<p>Subject line: Reminder: Copyediting review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt; Content specialist &gt;,</p> <p>Thank you again for agreeing to copyedit the <i>PerformYard</i> Performance Management System.' This is a gentle reminder that your feedback is due by &lt;DEADLINE&gt;. Please let me know if this deadline still works for you.</p> <p>Thank you again for your collaboration in this project.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Thank you note	<p>Subject line: RE: Reminder, Copyediting review of '<i>PerformYard</i> Performance Management System'</p> <p>Dear &lt; Content specialist &gt;,</p> <p>Thank you for your feedback. I will be reviewing your comments and making changes where appropriate.</p>

	<p>Should anything be unclear within your comments, I will reach out for clarification, with the possibility of a review meeting. I checked our Outlook calendars and reserved on &lt;DATE &gt; from &lt;TIME 1&gt; until &lt;TIME 2&gt;. for an online meeting on ZOOM. I will let you know three (3) days before &lt;DATE &gt; if the meeting is indeed needed. Please let me know if this time works for you.</p> <p>Thank you again for your collaboration in this project.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
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### *Correspondence for the pilot test*

<p>Invitation to pilot course</p>	<p>Subject line: Request for participation in pilot course</p> <p>Dear &lt;NAME&gt;,</p> <p>I am writing to request your participation in a pilot course for the new <i>PerformYard</i> Performance Management System (PMS). We are holding this pilot on &lt;DATE&gt; from &lt;TIME 1&gt; until &lt;TIME 2&gt;. The PMS is an online platform, and this pilot is intended to collect feedback, to improve the platform before making it available to ABC's managers and supervisors.</p> <p>Would it be possible to let me know by &lt;DEADLINE&gt; if you are available to participate?</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
<p>Reminder</p>	<p>Subject line: Reminder: Pilot course (&lt;DATE&gt;, &lt;TIME 1&gt; - &lt;TIME 2&gt;)</p> <p>Dear &lt;NAME&gt;,</p> <p>Thank you for agreeing to participate in the pilot offering of '<i>PerformYard</i> Performance Management System.</p>

	<p>This is a reminder that the pilot will be taking place on &lt;DATE&gt; from &lt;TIME 1&gt; until &lt;TIME 2&gt; in one of ABC's virtual classrooms. The only materials you require are a laptop with stable internet connection throughout.</p> <p>If you have any questions, please do not hesitate to contact me. My team and I look forward to seeing you virtually.</p> <p>Thank you again for your collaboration in this project.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>
Thank you note	<p>Subject line: Thank you for your participation!</p> <p>Dear &lt;NAME&gt;,</p> <p>Thank you for your participation in the pilot of this course. Your feedback is valuable and greatly appreciated. It will be taken into consideration for the improvement of the course.</p> <p>Best regards, Ehab Rashid Performance Consultant &lt;CONTACT INFO&gt;</p>



**Appendix 4: Draft Updated Job Descriptions – L&D Team**

Job Title	L&D Supervisor
Job Type	Full-time
Job Description and Tasks	<p>The L&amp;D Supervisor is responsible for managing a team of 8-10 language instructors, including schedule coordination, <b>performance management</b> and ongoing communication:</p> <ul style="list-style-type: none"> <li>• Day-to-day management of a team of 8-10 language instructors, including tracking training sessions and attendance, review of daily lesson logs and weekly deliverables, and providing feedback to instructors on a <b>week-to-week basis</b></li> <li>• Send progress reports and feedback summaries to L&amp;D Director on a weekly basis</li> <li>• Guide instructors in resource selection, communication, collaboration, and presentation.</li> <li>• <b>Coordinate and confirm schedules and schedule changes with instructors and Logistics Client Relations Coordinator before contract starts and twice a month during the contract.</b></li> <li>• <b>Coordinate and communicate approved schedules and schedule changes to instructors</b></li> <li>• <b>Provide performance reviews to instructors using Performance Management system: monthly 1-on-1s, quarterly goal setting and check-ins, and annual review process</b></li> <li>• Evaluate need for updates to course materials based upon current topics and instructor feedback</li> <li>• <b>Provide content updates to LMS Administrator and communicate directly with in a consistent and timely manner (bimonthly - monthly)</b></li> </ul>
Qualifications and Related Work Skills	<ul style="list-style-type: none"> <li>• Post-secondary education in instructional design or related field</li> <li>• A minimum of two years' work experience in e-learning-based instructional design</li> <li>• A minimum of two years' work experience with a learning management system (LMS)</li> <li>• Advanced in Microsoft Office and Articulate (or other authoring software)</li> <li>• Proven leadership and supervisory skills managing a team</li> <li>• Strong written and verbal communication skills</li> <li>• Effective time management and multitasking skills</li> <li>• Proven ability to work well under pressure and meet all guidelines</li> <li>• Strong people management skills</li> </ul>

Job Title	LMS Administrator
Job Type	Full-time
Job Description and Tasks	<p>The LMS Administrator is responsible for both content updates and administration of the Learning Management System (LMS):</p> <ul style="list-style-type: none"> <li>• Day-to-day management of the Learning Management System (LMS), including implementation of courses, content management, employee registration, notification, and assessments</li> <li>• Assess all changes to the LMS, posts and test courses, ensuring accurate assignment and scoring</li> <li>• Create and maintain LMS system training documentation, including policies and procedures</li> <li>• Track training sessions and attendance; manage training announcements <b>in a consistent and timely manner (bimonthly - monthly)</b></li> <li>• Monitor and track training enrollment, following up with the L&amp;D team <b>in a consistent and timely manner (bimonthly - monthly)</b></li> <li>• Train and support corporate trainers on the use of the LMS</li> <li>• Identify, troubleshoot, and resolve problems with course design, LMS configuration and infrastructure</li> <li>• <b>Provide technical support and communicate directly with users of the LMS, i.e., L&amp;D Team and language instructors in a consistent and timely manner (bimonthly - monthly)</b></li> <li>• Investigate and resolve technical issues associated with learning systems and tools</li> </ul>
Qualifications and Related Work Skills	<ul style="list-style-type: none"> <li>• Post-secondary education in instructional design or related field</li> <li>• A minimum of two years' work experience in an e-learning-based environment</li> <li>• A minimum of three years' work experience with a learning management system (LMS) administration/management, including leveraging information architecture and technology</li> <li>• Advanced in Microsoft Office</li> <li>• Attention to detail and accuracy</li> <li>• Strong written and verbal communication skills</li> <li>• Effective time management and multitasking skills</li> <li>• Proven ability to work well under pressure and meet all guidelines</li> <li>• Strong technical skills</li> </ul>