

## Sample Articulation Document for Instructional Design

By following the process described here, we will develop a deliverable that meets the instructor-expert's concrete learning objectives and is finished on spec, on time, and on budget. Our first major goal will be to establish a prototype deliverable—one with basic functionality—at the earliest possible point in the project. We will then expand the *scale* of the deliverable's features, even while refining their *scope*, through successive iterations. Each iteration of the deliverable will be subject to formative evaluation, including assessments by the instructor-expert and IDD team. Through careful articulation of learning objectives, regular use of the project website, and bi-weekly web meetings with the instructor-expert, we will maintain open communication between all of the project's stakeholders. This will ensure that all members of the team consider themselves responsible for generating a deliverable that meets or exceeds industry standards while remaining within the project's parameters.

### PHASE 1: Needs Assessment & Analysis

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*Time commitment from instructor-expert: 2-8 Hours*

Our first step is to establish open communication with the instructor-expert. This entails asking him or her for relevant instructional materials, coming up with a standing meeting that fits his or her schedule, and figuring out what working methods he or she prefers.

We will also research the deliverable's target audience, including historically successful course materials, so as to tailor our writing and instructional design plans to our learners' needs.

#### Project Planning

Quality assurance begins with project planning. All milestones, sign-offs, and approvals, including review and revision time, will be scheduled, broken into discrete tasks, and assigned using Microsoft Project. The resulting timeline will be monitored and kept up to date by the project manager.

Our dedicated project website is a vital piece of the QA process. We will use this site to conduct day-to-day communications between members of the IDD team and the instructor-expert. This site's functions allow for:

1. Version control of documents using a document management system, rather than emailed attachments
2. A discussion forum that will ensure transparency, accountability, and access to all project communications for every member of the team
3. Clear, weekly statements of evolving project goals, which will automatically be emailed to all team members and authorized stakeholders.

We will also conduct weekly online meetings during which the instructor-expert will provide feedback, answer questions, and review schedules. Meeting notes will be saved to the project website.

### PHASE 2: Preliminary Specifications and Design

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*Time commitment from instructor-expert: 8-30 Hours (depending on deliverable's interactivity level)*

#### Initial instructional design

We will analyze and outline the deliverable's content, determine the main components of the training formats, and coordinate the two.

## Client concept approval

From the outlines, we will develop final concepts and obtain approvals from the instructor-expert. The Concept Approval Form (CAF) is a key part of this stage. The CAF outlines look and feel, features, functionality, and level descriptions (for learning games). It also includes a storyboard or blueprint. The instructor-expert will suggest revisions before giving his or her final approval. Thus, the CAF reduces the incidence of mismatched expectations and the attendant need for late-in-the-game adjustments.

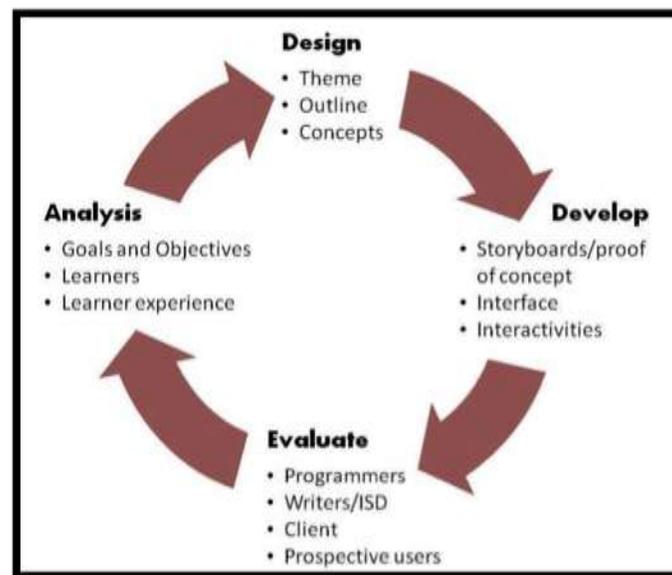
## Scripting/copy writing

We will compile our approved content and begin scripting the deliverable's various training formats, including voice over scripts, video scripts, tutorial scripts, game storyboards/copy, job aids, and teaching aids.

## Iterative Process

We will use an iterative development process to ensure that the final deliverable meets our standards and achieves the instructor-expert's learning objectives.

If permitted by the project's timeline and scope, we will use a *cyclical* iterative development process. After each prototype deliverable is reviewed and tested, we will return to the design stage and produce a new prototype, one that builds and improves on the previous version.



## Formative Evaluation & User Testing

Our user-centric development methodology means that stakeholders, experts, and novices will be asked to test deliverables at various stages. Online questionnaires will ensure that the testers' feedback is documented, discussed, and implemented by the development team.

## **PHASE 3: Graphic Development**

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*Time commitment from instructor-expert: 0-2 Hours*

### **Art development**

Our artists and graphic designers (in-house or contracted) will produce visuals as they are called for during a cycle of internal reviews with instructional designers. The artwork will then be presented for client approval and revised as necessary throughout the alpha-beta review process. Modules will be designed according to the particular look and feel desired by the instructor-expert, with a unified color scheme, standard font, and consistent overall format.

Before the design process starts, our graphic designers will identify the program's:

1. Purpose
2. Intended audience
3. Desired functionality
4. Potential future purpose, audience, and functionality

Our designers will also consider the style of existing course materials and determine whether the deliverable should mimic them. The designers will then create mockups for the instructor-expert's review; these will:

1. Provide multiple color options
2. Preview the user interface
  - a. How does the user navigate from one module to another?
  - b. How does the user navigate from page to page?
  - c. How does the user access external assets (videos, PDFs, etc.)?
  - d. What other buttons or controls might be necessary?
  - e. What branding does the course require?

### **Our graphic design process will generate:**

1. User interfaces that are easy to navigate, with standard controls that are consistently placed from page to page.
2. Programs that are reusable and flexible enough to allow for editing by the client.
3. Designs that fit the content, thanks to constant collaboration with the instructional designer.
4. Designs that translate to interactive, easy-to-use programs, thanks to collaboration with the programmer.

## **PHASE 4: eCourse Programming & Assembly**

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*Time commitment from instructor-expert: 24-36 Hours (8-12 hours/review cycle)*

### **Programming**

Programming will commence as soon as the CAF is complete. We will start by using scratch graphics and copy, and continue to make adjustments throughout the review cycle.

### **Quality assurance and user testing**

During both the content development/scripting phase and the component-deliverables development phase, we will undergo three main review cycles: instructor-expert alpha review, instructor-expert beta review, and instructor-expert final review/approval. Each cycle will be preceded by a two-person internal proofing and functionality review. We will designate a dedicated reviewer who will verify that the deliverable meets the standards expressed in the project's instructional design and technical specifications documents.

# MINDMELD

Jon D. Aleckson and Penny Ralston-Berg

*Micro-Collaboration Between  
eLearning Designers and Instructor Experts*

Week											
	2	4	6	8	10	12	14	16	18	20	24
<b>Phase 1: Needs Assessment</b>	Project Plan and Needs Analysis	Completion & Approval									
<b>Phase 2: Instructional Design &amp; Conversion Specifications</b>		Concept Blueprint		Design Navigation Diagrams	Prototypes	Completion and Approval					
<b>Phase 3: Graphic Development</b>				Graphic Development		Completion and Approval					
Digital Recording of Video and Spoken Text						Video and Audio Recordings	Completion and Approval				
<b>Phase 4: Development, Testing and Training</b>				Modules Development: Alpha		Modules Development: Beta		Quality Assurance and User Testing	Training	Final Delivery	