

6.2 | Create: Tips for Writing Design Plan Documents

Use this annotated list of contents and the tips on writing to your audience to guide your preparation of a project scope or design plan document for stakeholder review.

Before you begin...

Following your analysis activities, think through the results and the impact of those results on all elements of the instructional design. Your results will likely include an analysis of the learner audience, the overall instructional goal, the different contexts (performance, learning, and cultural), the content, and the assumptions about learning and the theories and pedagogical approaches that will best support that content. A design plan or scope document needs to communicate the analysis data and the resulting implications for the instructional design to stakeholders in a way that informs but does not bore them.

This fact should guide your decision on a format for the document and its contents. One option is a concise report that begins with a one-page executive summary highlighting key points from the document. To convey the instructional content, you can use an outline, a prototype, a flow chart, a hierarchical map, or other format that supports the type of content you have analyzed. Content detail can often overwhelm your audience, so consider including the bulk of that detail in appendix items, being sure to refer the reader to each appendix item in the appropriate place within the larger design plan.

Design Plan Contents:

Title Page, Executive Summary, and Table of Contents – Begin with a title page that identifies the name chosen for the proposed instruction, the stakeholders for which the plan is being prepared, and your own name and contact information. This should be followed by a one-page executive summary that provides brief descriptions and key conclusions for each major section of your design plan. Then provide the reader with a hyper-linked table of contents that includes the major sections, the references, and each named appendix item.

- I. **Introduction** – The introduction includes information on the title and target learner for the proposed instruction, the background of the project, a justification of the need for the instruction (what is the current situation, what is the desired situation, and what is the resulting gap or need that you will fill with the instruction?), and the overall goal or intent of the instruction (what will it accomplish for the target learner?). Ideally, key claims you make in this section are supported with the literature and/or statistics from your analysis activities. Sub-sections that enable you to elaborate on this information may include:
 - **Learner Analysis** – This section identifies the target learner and how that learner was identified, whether all learners are assumed to be similar or if there is any diversity in the learner population, the prior knowledge and experience of the learner with respect to the topic of the instruction, and the applicable learner characteristics and needs. It should summarize and substantiate conclusions based on learner analysis data. Ideally, you will include the details of the learner characteristics and needs in an appendix item.
 - **Performance Context, Learning Context, and Cultural Context** – This section describes the performance context where the learner will use the knowledge and skills s/he gains through this



instruction, and the learning context where the learning will take place (whether face-to-face, blended or virtual). It also describes the alignment between the performance and learning contexts and how the learning context and content are being designed to increase their alignment or similarity to the learner's future performance content. It addresses whether the learning context is compatible with learner needs and characteristics, and addresses the existing societal and/or organizational cultures and how the design of the instruction will be influenced by those cultures.

- **Brief Description of the Content** – The following section of your design plan will contain a more detailed discussion of the content, but in your Introduction you should use a few sentences to describe the general content to be covered in the proposed instruction.
- **Overall Instructional Goal** – The Introduction section should then end with an unambiguous, overall instructional goal that clearly delineates the scope and aim of the project.

II. Instructional Treatment – This section addresses the details of the content that resulted from your content analysis, and the proposed instructional treatment to be used for the design of the instruction. You should be able to justify your instructional treatment on the basis of how it will address the demands of the content, meet the needs of the learners, and enable learners to achieve the overall project instructional goal. Sub-sections that enable you to elaborate on this information may include:

- **Content Analysis Summary** – This should briefly describe how the content of the proposed instruction was determined, verified, classified, prioritized, and sequenced. It should identify the knowledge, skills, and attitudes (KSAs) necessary for the learner to achieve the instructional goal. The dependencies between each of the content topics, as well as any prerequisites that learners should possess, should also be identified. This section should refer the reader to appendix items that provide the details of the content classification methods used. The methods used to classify the content may include the identification of the learning domain for each KSA (cognitive, psychomotor, and/or affective domains), a DIF analysis of content items (difficulty, importance, and frequency), the identification of Gagne's types of learning outcomes, the identification of the Bloom's thinking skills levels to be addressed for the cognitive content, and the distinction between need-to-know (essential) and nice-to-know content. (See chapter 5 of *Streamlined ID* for details on each method.)
- **Progression of the Instruction** – The Treatment should also provide a description (and possibly a flow diagram or concept map) that clearly illustrates the progression of the major sections of the instruction. This description should also indicate the delivery modality for each of those sections (asynchronous, synchronous, face-to-face, online, etc.).
- **Aligned Learning Outcomes/Objectives, Assessments, and Teaching/Learning Strategies** – The terminal and enabling learning outcomes or objectives that were identified as a result of the content analysis, and the assessments and teaching/learning strategies selected to support each of those outcomes constitute the "skeleton" of your design plan, and they are key to the structure of the final instruction. These elements can be presented in a three-column table that aligns each assessment and strategy to the learning outcome it is designed to support. Since this table can extend for several pages, it is best included as an appendix item and referenced and summarized in the body of the plan where the key terminal outcomes should be listed. Ideally, the table will include a numbering system or some other means to identify which assessments and strategies are designed to support each outcome.
- **Technology/Media Plan** – Your plan should include a clear description of the instructional materials, technology tools, and delivery systems to be used for the instruction. It may also need



to identify the technologies required to actually produce the instructional materials. The technologies selected should be described briefly in a paragraph in your Content Treatment. In that paragraph, you may also choose to refer the reader to the outcomes/assessments/strategies table in the appendix, including a fourth column in that table to illustrate how each technology selection is aligned to the assessment or strategy it is intended to support.

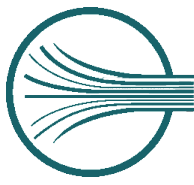
- **Assumptions about Learning, Theory Base, and Pedagogical Approaches** – Effective instructional designs are grounded in the research on how people learn and are based on what has proven to work in instruction. A plan should therefore provide justification for the design decisions it contains by providing the theoretical and pedagogical basis for the design. This is typically done in a paragraph or two that describes: (a) the ID's (and/or stakeholder's) assumptions of how learning occurs, (b) the theory or theories that reflect those assumptions and from which the design principles used were drawn, and (c) the pedagogical approaches used to guide the selection of teaching/learning strategies and assessments. (See Chapter 6 of *Streamlined ID* for more.)

III. **Implementation and Evaluation Plan** – Depending on the formality of your project and the nature of the sponsoring organization or individual, it is often wise to include a description of your plans for implementation of the instruction and its evaluation. Implementation includes both the management of the project and development of the instruction, as well as implementation of the finalized instructional materials. You may need to include a milestone schedule and a project budget. Or it may be necessary to include a description of the team of individuals who will develop and implement the instruction, along with their roles and responsibilities. Plans for the technical and instructional support of the learners and any facilitators or instructors should also be included, as well as plans for maintaining the instruction over its anticipated lifetime. Information on the formative and summative evaluation of the instruction will provide stakeholders the opportunity to agree with or comment on how you intend to judge the success of the project and the instruction. Formative evaluation measures could include plans for pilot testing a prototype or first draft of the instruction, subject matter expert (SME) reviews, usability and functionality testing, and the metrics to be used for quality and accessibility checks. Summative measures are often identified by the level of Kirkpatrick evaluation they are designed to address: reaction, learning, transfer/behavior, and/or impact/results. These measures can be conveniently and concisely summarized in a table. That table can also specify the type of benchmark data to be collected prior to the implementation of the instruction that can be later compared to the results of the evaluation measures.

IV. **Conclusion** – At the conclusion of your document, summarize your justification for how the proposed project and approach will address the organization's goals, the identified gap or needs, and the needs of the target learner. You should also provide your stakeholders (readers) with directions on how to contact you to ask additional questions and to communicate their feedback and approval.

References

Appendix Items – All appendix items should be lettered according to the order in which they are referenced in the body of the design plan. They should be included in that same, corresponding order in the appendix, and each appendix item should be listed in the table of contents.



Consider How to Gear the Document to the Audience:

The way you introduce and communicate your project purpose and scope depends on the nature of your stakeholder audience (readers). First, consider the status of the instructional design/development project:

- Is it a new project just being proposed?
- Is it approved but requires funding?
- Or have you been assigned to define the scope of an approved and funded project?

In any of these scenarios, the document you produce will be in the form of a proposal and the communication style should be authoritative and persuasive. You will communicate the problem, your proposal for a solution to that problem, and the support for your solution. Your design document should convince stakeholders of the worth of the project; its relationship to an identified problem, challenge, or gap; and its relationship to the organization's overall mission or goals. It should address any stakeholders responsible for approving the use of the required resources.

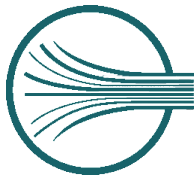
Next, consider for whom you are writing the design document, and the information these individuals require to approve your proposal. The audience will likely include key stakeholders who have decision-making authority over the approval, funding, and/or scope of your design project. Frequently, you will have several different stakeholders who must make different decisions on the project. For example, your readership may consist of senior management in the organization who will decide whether:

1. They concur with you about the nature and seriousness of the problem or gap you've described in your proposal;
2. The solution you've proposed is likely to address and solve that problem or gap; and
3. The solution you've proposed is worth the resources required to implement it.

Middle-level individuals who authorize manpower hours, assign specific talent to the project, or authorize the purchase of equipment or software for your effort may also read your proposal. Immediate supervisors reading your document may merely be checking it for completeness and accuracy. You may also be writing your document for colleagues who will work on the project with you, and who need a common language to facilitate discussions and agreement on project purpose, goals and development plans. In either case, it may be appropriate to include information in your plan on how you will communicate and collaborate with others involved in the project, including design team members, instructors or facilitators, sub-contractors, and organizational entities.

Engage the Reader's Attention:

As you develop the introduction to your design document, you must engage your reader's attention. To be successful in this task you must consider the identity of your **reader**. Who is your reader and what is their interest in the instruction you propose to develop? Will your reader be interested in how the product aligns with or supports overall organizational goals, how it relates to other instruction currently in place or being developed, how the development or implementation of the instruction will impact the organization's workflow, or other issues or multiple issues? Identifying this information will prepare you to present your introductory information with the reader's interests in mind. If multiple stakeholders will be reading and signing off on your design document, try to address all their interests but in a concise manner, using headings that the reader can use to focus in on the issues in which they have a primary interest (and to skip those with which they are not concerned).



Address Applicable Background Information:

Each project typically has background information that illuminates or explains different aspects of the design. What background information does the reader need to know about the project and what can you assume they already know? Do they know why the instructional project has been proposed and by whom it was initiated? Do they know the problems or challenges that precipitated the project? Do they know what is at stake and why the instruction is critical to fulfilling the goals of the organization? Use clear headings to address this information so stakeholders can skip topics with which they are already familiar.

Provide a Strong Problem and/or Needs Statement and Justification:

Your introduction should include a clear statement of the problem or challenge to be addressed by the instructional project, along with a description of the gap between WHAT IS and WHAT SHOULD BE and how your proposed instruction would address that gap. Present the problem and solution in terms of the readers' interests. For example, if the reader is interested in profits, show how addressing the need will impact profits; or if the reader is interested in safety, describe how addressing the problem will improve safety.

After describing the problem, needs, and the proposed instructional solution, provide a justification or rationale for the instructional design. Once again, the reader's interests and familiarity with instructional design, as well as the nature of their position with respect to the approval of the project, will determine the scope of your justification/rationale. Is the reader familiar with instructional design theory and jargon? Do you need to educate them? What is their attention span? Will they become impatient with long explanations? What authority do you have in their eyes – do they think you know what you're talking about? Will they assume your design is not well-thought-out if you don't give detailed explanations? What is the potential cost (in terms of time and money) of the resources you are requesting? Will you need to justify the expense with an estimate of the return on the investment or examples of results from similar projects? Will they want to see references to statistics or the literature that support your claims? The answers to these questions will determine the scope and length of your rationale or justification.

The rationale or justification should be as clear and concise as possible. The remainder of the design plan should then provide the "backup" for the arguments you have made.