UCLA iSchool

Application Checklist

Please read all guidelines, including the requirements for successful class completion and learner packet. Submit all of the following forms for CEU Approval.

- ☐ Application Checklist (this form)
- ☐ CEU Approval Request
- ☐ Instructor/Coach & Learning Event Information
- ☐ Instructor/Coach Profile (attach resume for each person)
- ☐ Training Schedule Worksheet
- ☐ Instructor/Coach Disclosure Form
- ☐ Facility Assessment Checklist

- ☐ CET Needs Analysis
- ☐ Learning Event Development Outline*
- ☐ Learning Event Design Document*
- ☐ Learning Event Agenda
- ☐ Tests (pre- and post-) and other training handouts and materials*

*For Initial Application only, if there is no revision.
Learner Packets must be submitted within 30 days of course completion in order to be eligible for CEUs.

Submit to: Dr. Diana Ascher

Director, Information Studies Research Lab
Department of Information Studies
UCLA
102A GSEIS Bldg, Box 951520
Los Angeles, CA 90095

Instructor Verification

I verify that:
- Information provided with this application is true and correct to the best of my knowledge and belief
- I will make myself available to learners in the class (through phone, email, and/or personal contact) who have requested clarification or further information regarding the class
- I have disclosed any proprietary interest that I may have in any product, instrument, device, or material to be used in this class.

_____   _____
Signature of Primary Instructor/Coach   Date

_____   _____
Learning Event Title   Proposed Date(s)

UCLA iSchool

CEU Approval Request Form

Learning Event Title   _____

Date(s)   _____   Number of Contact Hours   ____

Location   _____   Format   _____
                                              (course, workshop, etc.)

Target Learners   _____

Method of Needs Assessment   _____

Instructional Objectives   _____

Pre-Learning Event Communications

Recordkeeping & Maintenance System

References
ANSI/IACET 1-2013 Standard Category 6

UCLA iSchool

Instructor/Coach & Learning Event Information

Name _____

Organization _____

Address _____

_____

_____

Phone _____

Email Address _____

Learning Event _____

Date(s) _____

List all instructors / coaches & their affiliations; attach a resume for each

_____ _____

_____ _____

_____ _____

Learning Event Location and Address

Total Contact Hours ____

Continuing Education Units (CEUs) are defined as ten (10) contact hours of participation in an organized educational experience under responsible sponsorship.

Non-allowable activities: unplanned and unsupervised activities such as breaks, introductions, study time, etc.

Reference

ANSI/IACET 1-2013 Standard Category 6

Training Schedule Worksheet

Please complete this form for each day of your learning event. Completed forms must be submitted to the Chief Education Officer two weeks prior to the end of the learning event.

Continuing Education Units (CEUs) are equivalent to 10 contact hours of participation in an organized educational experience under responsible sponsorship.

1 CEU = 10 contact hours
.5 CEU = 5 contact hours

Allowable: supervised study, lecture/discussion, group activities, in-class projects, etc.

Non-allowable: unplanned and unsupervised activities such as breaks, introductions, study time, etc.

Learning Event:_____ Total Number of Hours: _____

Activity	Minutes	Allowable	Non-Allowable
Totals			

For Office Use Only   Calculation of Allowable Time for CEU Eligibility

Minutes	−	Minutes	=	Minutes

Minutes	÷	60	=	Hours	÷	10	=	**CEUs**

Admin Initials: _____

UCLA iSchool

Effective Date: 09/01/15
Revision Date:
Revision No.: 1
Page No: 1
Approval:

Instructor/Coach Disclosure Form

Please complete this form as part of your Learning Event Application Packet.

1. Use the space below to disclose any proprietary interest you may have in any product, instrument, device, service, or material you plan to discuss in your learning event.

2. Do you plan to require the purchase and/or use of any of the items you have named above for participation in your class?   No.   Yes.

   If yes, will you receive compensation, either directly or indirectly, for those items?

   If so, what is the source of that compensation?

   Signature: _____

Reference
ANSI/IACET 1-2013 Standard Category 8

Facility Assessment Checklist

Please complete this form as part of your learning event application packet.

Facility Name
Facility Address

Primary Contact

Please answer the following questions for your evaluation of this facility.

Ease of Access
How easy is the location to find and get to?   easy
Is it close to the majority of the participants? yes
Is a map available to send to participants? yes
Is the facility accessible to individuals with disabilities?   yes
Is safe, well-lit parking available nearby?   yes
Is there a fee for parking? If yes, how much? yes, $ per day
Is the facility easily accessible to public transportation? yes

Permissible Activity
Are food and drinks allowed in this facility?   yes
Does the facility have a no smoking policy?   yes

Space
What is the room capacity?   capacity varies, depending on configuration
Which statement best describes the room?

☐ The room is square.
☐ The room is rectangular.
☐ The room is long and narrow.
☐ The room is divided by columns/walls/inserts.

Will audio-visual equipment decrease this space significantly?   no
Is extra space available for breakout groups?   yes
Are adult-size table and chairs available? yes
Is the furniture satisfactory?   yes
What types of tables are available?

all configurations are available

Equipment
Is there an equipment-use fee?   everything is included
Who will be available to help with equipment? professional on-site staff

What is the availability and cost of equipment?

all included in package

☐ Overhead projector ($)	☐ LCD projector ($)	☐ Computer ($)
☐ Screen ($)	☐ Whiteboard & markers ($)	☐ VCR/DVD player ($)
☐ TV (size:) ($)	☐ Podium ($)	☐ Flip chart paper ($)
☐ Microphone and sound system ($)	☐ Wireless Internet connection ($)	☐ Dongles/cables for laptop connection ($)

Opening and Closing

Who is responsible for opening and closing the facility?   staff

Does someone need to pick up a key before the training?   no

Who is responsible for setting up the room prior to the learning event?   staff

Is early access to the facility for set up permitted? If so, under what conditions/at what times?   no

Please initial beside each statement to verify suitability of this facility for your learning event. Your initials signify that you understand all learning event sites and/or classrooms must meet the standards set forth by IEEI in accordance with the ANSI/IACET 1-2013 Standard.

The facility is in a convenient location for learners.   _____

The location and classroom are handicapped-accessible for persons with disabilities.   _____

Seating capacity accommodates maximum number of seats allowable per session.   _____

Classrooms are well equipped with adequate lighting.   _____

The classroom is conducive to learning events for adult learners (adult tables, desk chairs, etc.)   _____

Classroom location is clearly marked, controllable and easily accessible.   _____

Location is maintained well, with no signs of disrepair and/or neglect.   _____

Reference
ANSI/IACET 1-2013 Standard Category 8

Facility_Assessment_Checklist.docx

Continuing Education & Training Needs Analysis

Purpose

The purpose of a Continuing Education & Training Needs Analysis is to justify the development of a learning event before it is designed. A basic needs analysis describes the targeted learner, the learning event, and the rationale for offering the learning event. In other words, on reading this completed document, one should have a good sense of why the learning event is necessary to address an unmet need for a particular audience.

Please submit this form with your CEU Application.

1. Who will make up your training audience?
General description:
Specific description:

> *Example*
> General: Secretarial support staff
> Specific: Secretarial support staff who incorporate photographs in final reports)

2. What type of training do they need?

3. Why do they need this training? (Specific justification for holding the learning event)

4. What qualifications are required for the instructors? (Include related work experience, educational background, and/or any special licensing required to lead the learning event.)

5. What type of training facility will be needed to do this training effectively? (Include seating chart/room configuration drawing, if relevant.)

> *Example*
> A heated/air-conditioned classroom with a bank of eight (8) computers placed in a semicircle facing a large screen. A 9th teaching computer, linked to a Power Point® projector, should be in the center of the semi-circle facing the same screen. Each computer, including the teaching computer, should be equipped with Adobe Photoshop. The instructor and the student will need comfortable chairs placed behind the computers, facing the screen. The instructor can use the screen to teach a step-by-step program to utilize Adobe, while he or she can easily move to the four computers on either side to assist and to check and see if each student is following the program.

6. What type of equipment will be needed to teach this learning event?

7. Describe the teaching methods that will be used over the course of the learning event, as well as the estimated time employing each method.

8. What is the time frame necessary to complete this training? Provide the number of contact hours, days of the week, times, and the start and finish times.

> *Example*
> This course will take place over 3 consecutive days, beginning on Monday, September 13, 2010, and ending at noon on Thursday, September 16, 2010. The course begins at 8:00am each day and ends at 5:00pm on Monday, Tuesday, and Wednesday; Thursday, September 16, is a half day. Participants will be dismissed as soon as they complete the final exam.

9. What is the estimated cost of developing this learning event? Provide specific costs.

10. Who should be involved in the curriculum design? Be sure to consider who has subject matter expertise, as well as who is an experienced educator.

11. What will you charge per participant to attend and complete this learning event?

12. Where will the training take place?

> *Example*
> A course on Modern Media Practice will be taking place in the Los Angeles area, where the majority of the learners are located. The location selected is adjacent to the new media complex in Santa Monica to reinforce the changes covered in the learning event.

13. What will be the business impact? What competencies are critical to business goals? What method(s) measure the business impact of those competencies effectively? Assign a weight to each competency, gather data on current competencies, and determine where performance gaps exist.

Example
A critical core competency for a proofreader is to read quickly, at a speed of approximately 3,000 words per hour. If a specific training's learning outcomes include increasing proofreaders speeds to this amount, then it would translate into proofreading more material in a shorter period of time (if they currently read slower than this amount). Take the current amount of proofreading that is currently achieved, and then measure the impact of the faster proofreading after the training, to determine the business impact.

Learning Event Development Outline

Please complete this document as part of your learning event application.

Learning Event Title: _____

1. Need: How was the need for this learning event determined? Describe the process by which the need for this class was made known.

2. Goal: In general terms, what is your goal for this class? State the overall goal or purpose you hope to achieve.

3. Learning outcomes: What are your specific objectives? State the learning objectives you want earners to take away from this class.

4. Learning strategies: How will you present your material in this class? Describe the methods or instructional strategies you will use in this class to meet your learning objectives. Describe the materials you will use in this class to meet your learning objectives, such as names of books, videos, and special equipment. Also attach a copy of all handouts you will distribute.

5. Assessment: How will you know if you were successful? Specify the competency demonstration techniques you will use to measure the learners' attainment of the learning outcomes.

6. Learning event evaluation: How will the learners provide feedback for continuous improvement of your learning event? The IEEI Learning Event Evaluation Form is available for your use.

It is suggested that you distribute an agenda to the learners at the beginning of the learning event. The agenda should specify each topic to be covered with an approximate time frame for discussion, and should also include any scheduled breaks and/or meal times.

I have attached an agenda to this application. □ YES   □ NO

I plan to prepare an agenda for this class. □ YES   □ NO

Reference
ANSI/IACET 1-2013 Standard Category 6

Instructional Design Document

Learning Event: SSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSSS

Instructional Design Name	Supporting Leadership Team	Champions	Target Audience
	Diana Ascher **Subject Matter Experts**	➤ ➤ ➤ ➤	

Summary Needs Assessment	Goal	Learning Outcomes
		➤ ➤ ➤ ➤ ➤

Delivery for Learning Event		
Facilitator:Participant Ratio	___ facilitators per ____ participants/learners	

Instructional Design Document Template, last updated June 27, 2018

On-site at client location
 	
➡ Start at 9:00 AM
 	
➡ End at 5:00 PM
	hours facilitation (minutes)
	➡ hours of non-instructional time (minutes)
	     ✓
	     ✓
	     ✓
	     ✓
	     ✓
	
	➡ hours of instructional time (minutes)
	     ✓
	     ✓
	     ✓
	     ✓
	     ✓

Online at IEEI	2.0 hours of implementation coaching and technical support (120 minutes)
	
	➡ Live Chat Session #1 (60 minutes) – synchronistic
	➡ Live Chat Session #2 (60 minutes) – synchronistic
	➡ Each session consists of the following:
	   - Synchronistic discussions/messaging between coach(es) & participants
	     ✓

I b]ñ Cb!g]hˁ	H]a Yˁ 5``chˁYXˁ fˁa]bi hˁgˁ	Di fdcgYˁ	Ci hˁWˁa Yˁ fˁc[b]ñj Yˁ@ˁjˁYˁŁ	±bgˁhˁi WˁjˁcbUˁ A UˁñYˁf]ˁUˁgˁ	A Yˁñ cXˁ⁄ˁ @ˁUˁfb]ˁb[ˁGhˁñYˁ	5 ggˁYˁggˁa Ybhˁ⁄ˁ DYfZˁcfa UˁbWˁˁ7 f]ˁñYˁf]ˁU	
Cj Yfj]Ykˁ						✓ **Q & A Knowledge check**	
I b]ñ Cb!g]hˁ	H]a Yˁ 5``chˁYXˁ fˁa]bi hˁgˁŁ	Di fdcgYˁ	Ci hˁWˁa Yˁ fˁc[b]ñj Yˁ@ˁjˁYˁŁ	±bgˁhˁi WˁjˁcbUˁ A UˁñYˁf]ˁUˁgˁ	A Yˁñ cXˁ⁄ˁ @ˁUˁfb]ˁb[ˁGhˁñYˁ	5 ggˁYˁggˁa Ybhˁ⁄ˁ DYfZˁcfa UˁbWˁˁ7 f]ˁñYˁf]ˁU	
A cXi `Yˁ%						✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator will use a rubric to assess the groups' submissions from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation **End of Module 1 Survey**	

Instructional Design Document Template, last updated June 27, 2018

Unit On-line (minutes)	Time Allocated (minutes)	Purpose	Outcome (Cognitive Level)	Instructional Materials	Method of Learning Style	Assessment Method/ Performance Criteria	
Module 2						✓ **Q & A Knowledge check**	
						✓ **Group Presentations** Facilitator will use a rubric to assess the groups' submissions from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation	
						End of Module 2 Survey	

Instructional Design Document Template, last updated June 27, 2018

Unit Outline	Time Allocated (minutes)	Purpose	Outcome	Instructional Materials	Method/Learning Style	Assessment Event/Performance Criteria	
Module						✓ **Q & A Knowledge check**	
						✓ **Group Presentations** Facilitator will use a rubric to assess the groups' submissions from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation	
						End of Module 3 Survey	

Instructional Design Document Template, last updated June 27, 2018

Unit Outline	Time Allotted (minutes)	Purpose	Outcome	Instructional Materials	Method of Learning Style	Assessment Event / Performance Criteria	
Module 4						✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator will use a rubric to assess the groups' submissions from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation End of Module 4 Survey	

UCLA iSchool

@YUfb]b[˙9j YbħCi ħ]bY˙

<table>
<tr><td valign="top">

I. Welcome & Introductions
   a. Sign-in sheet
   b. Agenda

II. Cj Yfj]Yk
   a. Presentation & discussion
   b. Self-assessment survey
   c. Review survey using facilitator's "Ideal State" checklist

III. AcXi `Y˙%
   a. Presentation & discussion
   b. Small group activity
   c. Outcome assessment
      - Q & A knowledge check
      - Group presentation
   d. Module 1 survey

IV. AcXi `Y˙&
   a. Presentation & discussion
   b. Small group activity
   c. Outcome assessment
      - Q & A knowledge check
      - Group presentation
      - Module 2 survey

</td><td valign="top">

V. AcXi `Y'
   a. Presentation & discussion
   b. Small group activity
   c. Outcome assessment
      - Q & A knowledge check
      - Group presentation
   d. Module 3 survey

VI. AcXi `Y˙(
   a. Presentation & discussion
   b. Small group activity
   c. Outcome assessment
      - Q & A knowledge check
      - Group presentation
   d. Module 4 survey

VII. 7`cg]b[˙GYgg]cb
   a. Implementing best practices at work
   b. Coaching overview
   c. Online portal demonstration
   d. Certificate of completion

VIII. 9bX˙cZ7ci fgY˙Gi fj Ym˙

</td></tr>
</table>

=hYa˙	5Wij]˙m˙	5ggYgga Ybh˙	<UbXci h˙	Ci h]bY˙	Gi fjYm˙

Instructional Design Document Template, last updated June 27, 2018

=BGHFI A9BHG˙Ë˙CI H@B9G˙Ë˙<5B8CI HG˙Ë˙A5H9F=5@G˙

AC8I@9˙!˙%

=hYa˙	5Whjj]hm	5ggYgga Ybh	<UbXci h	Ci h]bY	Gi fjYm

Instructional Design Document Template, last updated June 27, 2018

TO BE DEVELOPED

INSTRUMENTS • OUTLINES • HANDOUTS • MATERIALS

MODULE 1.2

Item	Activity	Assessment	Handout	Outline	Survey

Instructional Design Document Template, last updated June 27, 2018

=BGHFI A9BHG˙Ë˙CI H@B9G˙Ë˙<5B8CI HG˙Ë˙A5H9F=5@G˙

AC8I @9˙!˙"˙

=Ya˙	5 Wij]m˙	5 ggYgga Ybh˙	<UbXci h˙	Ci h]bY˙	Gi fj Ym˙

=BGHFI A9BHG Ë CI H@B9G Ë <5B8CI HG Ë A5H9F=5@G

AC8I @9 !'(

=hYa	5Wrij]hm	5ggYgga Ybh	<UbXci h	Ci h]bY	Gi fj Ym

Instructional Design Document Template, last updated June 27, 2018

=BGHFI A9BHG´Ë´CI H@B9G´Ë´<5B8CI HG´Ë´A5H9F=5@G

7@CG9 ´ ´B9LH´GH9DG

=hYa			<UbXci h	Ci h]bY	Gifj Ym
End of Course Survey					X

Instructional Design Document Template, last updated June 27, 2018

Agenda

_____

_____

_____

➤ Welcome & Introductions	**9:00 am**
➤ Overview	9:30 am
➤ Morning Break	10:30 am - 10:45 am
➤ Module 1: _____	10:45 am
➤ Module 2: _____	11:45 am
➤ Lunch	12:30 pm - 1:00 pm
➤ Module 2: Continued	1:00 pm
➤ Module 3: _____	1:30 pm
➤ Afternoon Break	2:45 pm - 3:00 pm
➤ Module 4: _____	3:00 pm
➤ Closing Session	4:00 pm - 5:00 pm

Overview

Objectives

On completion of this course, learners will be able to:

-
-
-
-
-

Delivery

On-site: hours per day for   day(s)
Modular Curriculum

- Module 1:
- Module 2:
- Module 3:
- Module 4:

Online: 2 hours synchronous post-training implementation coaching & technical support

Activities

Evaluation

Materials

The learning environment includes computing resources to conduct:

- text composition
- presentation design

Other Resources

In addition to the on-site training sessions, IEEI subject matter experts will conduct two synchronous live chat sessions with teams to reiterate course concepts and guide participants through their collaborative work.

Adaptations

Accommodations will be made for learners requiring assistance. Please indicate necessary adaptations on the Pre-Learning Event Questionnaire.

UCLA iSchool

Attendance Verification Form

Name

Address

Phone

Email

State Lic. #

Course Title

CEU Course #

Course Date

Location

CEUs

Instructor/Coach's Name

Instructor/Coach's Signature

Instructor/Coach's Company   _____

To renew your IACET Certification, please submit a completed IACET Certification Renewal Form, the annual fee, and all CEU Attendance Verification Forms to IEEI's Chief Education Officer.

References
ANSI/IACET 1-2013 Standard 5

Attendance_Verification_Form.docx

Policy on Attendance & Assessment

- ☐ It is the policy of the IS Lab that each learner must successfully complete the assessment and attendance requirements in order to be awarded CEUs for a learning event.

Procedure for Awarding CEUs

- ☐ Mastery of learning outcomes
- ☐ Minimum attendance requirements for earning CEUs
- ☐ Evaluation
  - ☐ Submission materials, mastery assessment, & attendance report
  - ☐ Notification via email as to whether CEUs have been earned

UCLA iSchool

Example Evaluation Rubric Presentation Slides

Knowledge Work Boot Camp Team Activities

Rubric for evaluation

Needs Assessment	Absent or lacking substance 1	Substantive, yet incomplete 2	Comprehensive with detailed information in all categories 3	Notes
Identification of stakeholders & their motivations				
Description of key measures of success & data sources				
Discussion of challenges				
Discussion of potential solutions and/or next steps				

Rubric for evaluation

Social Media Plan	Absent or lacking substance 1	Substantive, yet incomplete 2	Comprehensive with detailed information in all categories 3	Notes
Description of IEEI Framework use in context				
Relevance of engagement strategies to chosen approach				
Description of plan				
Discussion of why the particular approach was selected				

Rubric for evaluation

Communication Platform	Absent or lacking substance 1	Substantive, yet incomplete 2	Comprehensive with detailed information in all categories 3	Notes
Identification of stakeholder audiences & interests				
Three key messages for each stakeholder audience				
Discussion of context & challenges				
Discussion of potential solutions and/or next steps				

Rubric for evaluation

Persuasive Discussion	Absent or lacking substance 1	Substantive, yet incomplete 2	Comprehensive with detailed information in all categories 3	Notes
Description of particular information practice				
Outline of persuasive argument				
Three-sentence pitches on IEEI Framework benefits				
Discussion of why the particular persuasive approach was selected				

Rubric for evaluation

Comprehensive Evaluation	Absent or lacking substance 1	Substantive, yet incomplete 2	Comprehensive with detailed information in all categories 3	Notes
Needs Assessment				
Communication Platform				
Persuasive Discussion				
Social Media Plan				