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Research Product 87-27

# Training Technology Transfer Process and Guidelines

Logistics Training Technologies Technical Area  
Training Research Laboratory

October 1987

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U. S. Army Research Institute for the Behavioral and Social Sciences

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Deputy Chief of Staff for Personnel

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for the Department of the Army

Allen Corporation of America

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19. KEY WORDS (Continue on reverse side if necessary and identify by block number) Training Technology transfer Training technology transfer Training Technology Field Activity Technology implementation		
20. ABSTRACT (Continue on reverse side if necessary and identify by block number) This report presents a set of guidelines for implementing a new training technology in an Army school environment. In an effort to improve the technology transfer process, the Army has established Training Technology Field Activities (TTFAs), a partnership among the Army Research Institute (ARI), the Army's Training and Doctrine Command (TRADOC), and Army Service Schools to facilitate training technology transfer.		

(Continued)

ARI Research Product 87-27

20. Abstract (Continued)

The guidelines present the activities necessary for successful training technology transfer using the TTFA team as the vehicle for implementation. The guidelines divide the transfer process into five phases. Each phase is further divided into three stages, with a decision point at the end of each stage. Within each stage is a set of activities that lead to the decision point. For each activity, a set of roles and responsibilities are identified and the major organizations involved in the transfer process are assigned these roles and responsibilities.

Research Product 87-27

## Training Technology Transfer Process and Guidelines

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October 1987

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## FOREWORD

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Successful training technology transfer is a difficult goal for the Army to achieve. The demonstrated training and cost effectiveness of a new training method, device, or technology does not ensure that it will be implemented and institutionalized in the Army training establishment. Training Technology Field Activities (TTFAs) have been established to meet this need. Each TTFA is a partnership effort consisting of the Army Research Institute, the U.S. Army Training and Doctrine Command (TRADOC) Training Technology Agency (TTA), and an Army school or other training organization. The Fort Lee TTFA has as a third partner the U.S. Army Quartermaster School (QMS).

A recognized TTFA need was for guidelines that would establish procedures and assign roles and responsibilities for implementing training technology in the TTFA setting. This report provides those guidelines.

The guidelines were developed by Allen Corporation of America for the Training and Simulation Technical Area, Training Research Laboratory, through arrangement with the Office of Personnel Management. They are part of Research Task 3.3.3, Application of Technology to Meet Supply Skills Training Needs, and responsive to a Memorandum of Agreement between TRADOC, QMS, and ARI (Establishment of a Training Technology Field Activity, Fort Lee, VA) dated 6 January 1984. Inprogress briefings were presented to key TTFA and QMS personnel, with the final guidelines delivered in June 1987. Comments provided by the sponsors and other interested organizations, particularly other TTFAs, will serve along with the results of trial use of the guidelines at QMS, as a basis for developing a future version of the guidelines.



EDGAR M. JOHNSON  
Technical Director

# TRAINING TECHNOLOGY TRANSFER PROCESS AND GUIDELINES

## EXECUTIVE SUMMARY

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### Requirement:

Develop guidelines for the transfer of training technology within the context of the TTFA.

### Procedure:

The effort began with the conduct of a workshop in which attendees provided lessons learned on technology transfer and participated in discussion groups on the various aspects of the technology transfer process. A proposed technology transfer model was developed, based on the proceedings of this workshop. The effort continued with a survey of selected Army schools to collect data on perceptions of the organization and structure of the TTFA and the responsibilities in the transfer process. Survey results were used to develop a matrix of responsibilities for the activities defined by the technology transfer model.

### Findings:

The guidelines developed and presented in this report describe the training technology transfer as a five-phase process. The phases are as follows: needs assessment, developing or adopting a training innovation, initial testing, expanded use (field testing), and routinized used. Each phase consists of three stages, each of which has a number of activities and is concluded by a decision point. The guidelines describe the roles of each of the TTFA partners in each activity.

### Utilization of Findings:

The guidelines can be used to guide the training technology transfer process. While the focus of the guidelines is on the introduction of computer-based instruction in the TTFA setting, it is felt that they should be applicable to other types of training technology and other settings as well.

# TRAINING TECHNOLOGY TRANSFER PROCESS AND GUIDELINES

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## CHAPTER 1 INTRODUCTION

### 1.0 Introduction

#### 1.1 Background

Technology transfer is a term which has been used to describe the process of improving the return on research and development (R&D) investments by increasing the utilization of the technology developed. As specifically applied to training technology within the Army, effective transfer requires the implementation of proven (i.e., training and cost effective) technology to the maximum extent practical within the Army training community. Historically, this has not been accomplished successfully. Numerous experimentally valid training methods, devices, and techniques are unused or underutilized, while much of the current training is unchanged from decades ago. In part, the problem results from the organizational separation of the functions of training research, training management and policy, and training development and delivery. Thus, the researchers who develop a new training method may not be available to help instructional developers and instructors implement it, or the training managers may not be aware of the policy changes which are required to implement the method.

In an effort to improve the technology transfer process, the Army has established Training Technology Field Activities (TTFAs). Each TTFA consists of a partnership arrangement among the Army Research Institute (ARI: responsible for training research and development), the Army Training and Doctrine Command (TRADOC) Training Technology Agency (TTA: responsible for training management and policy), and an Army training organization, usually a school (responsible for training development and delivery). The TTFA mission is to improve the effectiveness and efficiency of Army training through the application and evaluation of Army training technology, applying the combined efforts of researchers, training developers, and trainers.

Although the TTFA provides the overall organizational framework for training technology transfer, the detailed guidelines describing the actions required of the various TTFA partners is lacking. This booklet is a set of guidelines developed by the Allen Corporation under contract to the Office of Personnel Management. These guidelines were developed with two foci: the TTFA partnerships and Computer-Based Training (CBT). Thus they are designed to be used primarily by the TTFA participants as they transfer CBT technology into the Army classroom. However, they should be applicable to other types of training technology and to non-TTFA training settings as well.

#### 1.2 Guidelines Development

The effort began with a technology transfer workshop. The objectives of the workshop were to: identify and define appropriate terminology for use in the discussion of technology transfer issues; describe the phases and flow of the technology transfer process; suggest strategies which may be used during each phase of the transfer process; suggest indicators of successful technology at each phase of the transfer process; and prescribe instruments for measuring success or failure at each phase of technology transfer. Attendees were representatives of TTA, ARI, Army training organizations involved in TTFA

partnerships, and other personnel, both military and civilian, involved with or experienced in training technology transfer. They presented "lessons learned" in technology transfer, and participated in discussion groups on various aspects of the technology transfer process. The workshop proceedings are presented in a separate report (Allen, 1985).

A conceptual model of training technology transfer in the TTFA context was developed on the basis of the workshop. This model defined the basic phases of training technology transfer and the objectives and activities of each phase. It is documented in Scheirer and Hart (in press).

In order to define the responsibilities for training technology transfer in greater detail, a survey was conducted at two Army schools, one of which was participating in a TTFA, and one of which was not but had established a record of implementing training technology successfully. The survey process consisted of an introductory briefing, the administration of a questionnaire, and the conduct of individual interviews. The primary focus of the survey was on the perceptions of the organization and structure of the TTFA or school to accomplish training technology transfer. Respondents were asked who was actually responsible for the conduct of various technology transfer activities. If they indicated that a responsibility was shared, they were asked in the follow-up interview what organization they thought should have the primary responsibility. Inquiries about current transfer activities, technologies in use, and experience with and attitudes toward CBT were also included. These latter topics served primarily to describe the schools and the sample of respondents. They had little impact on the development of the guidelines themselves.

Over 91% of the respondents were school staff members from the Directorate of Training and Doctrine, Directorate of Evaluation and Standards, and training directorates and departments. The remainder were from other departments in the school and, in the case of the TTFA, from TTA and ARI.

In terms of position, 41% were division or branch chiefs, 20% were training specialists or instructors, 15% were department directors or deputy directors, and the balance were various staff members. The majority: had previous experience with CBT within the past five years; perceived that they were involved in training technology transfer; and were aware of the technologies used within the school.

The survey results were used to develop a matrix of responsibilities for the activities described by the technology transfer model. They did not cause any alterations to be made in the model itself. The culmination of the effort is a set of guidelines for implementing the technology transfer process, which is presented in the balance of this report.

## CHAPTER 2 TRAINING TECHNOLOGY TRANSFER GUIDELINES

### 2.0 Transfer Process Overview

The training technology transfer process consists of a series of activities which facilitate the introduction of new training technologies within the TRADOC environment. The process focuses on the introduction of computer-based training methods, but is generic in that it suggests a desired sequence of events appropriate for the introduction of any new technology. The process outlined here is based on the assumption that one or more individuals from each of the TTFA partners (ARI, TTA, and the School) have been assigned responsibilities as "technology transfer agents". The guidelines refer to these individuals as TTFA Representatives. These guidelines detail the new job roles of these individuals, who are needed to carry out the complex task of implementing new training technologies. The process thus sets the stage for the TTFA as the vehicle for ensuring the success of new training technologies.

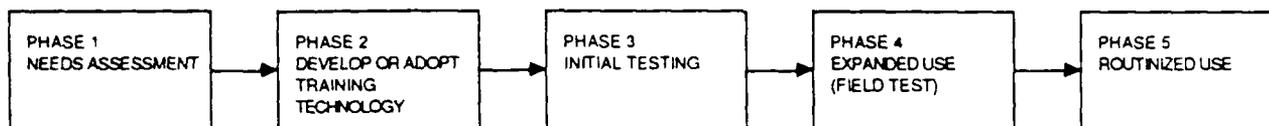
Computer-based training requires the implementation of a complex technology into a complicated, ever-changing environment. The new training technology consists of one or more of the following three major components: hardware (computer equipment), software (authoring systems for creating instructional courses), and the courseware (the instructional package for a specified course). The development of such technologies is a major undertaking in its own right and is not the focus of this document. Instead, this guideline focuses on the implementation processes surrounding the use of these technologies, specifically the transfer of a training technology from its developmental testing, to its full use for routine training.

The transfer of training technologies into full use is a process that occurs over time, usually a long time, and requires a considerable effort if success is to be achieved. The process developed here is divided into five phases of activity, covering the stages from needs assessment, through field testing, to routinized use. The strategy prescribed here is also an information-based change process, with data collection and feedback to guide the efforts of policy makers, transfer agents and trainers. In reality, it is recognized that these phases are frequently not followed in a neat sequence, but that activities skip back and forth between phases, or that some activities may be skipped altogether. Further, it may not be feasible to systematically collect all the data recommended here. However, the presentation of a fully developed technology transfer process may help users to better understand the complexities involved. To the extent that steps are skipped over, or that critical information is missing, the likelihood is reduced that the technology will yield successful outcomes. Training can be effective only if it is implemented properly.

The guidelines describe a sequence of activities with discrete decision points which, if followed, will provide greater assurance of successful, complete technology transfer and implementation.

## 2.1 Transfer Guidelines Overview

Previous research and the experience of Army personnel contacted for this project emphasize the uncertain nature of the transfer process. What can be successfully introduced into a specific training environment depends on: the training technology currently in use; the experience and needs of the participants; the nature of the proposed new technology; and the resources required by the proposed new technology. Further, before a new technology is attempted on a widespread scale, its feasibility and effectiveness ought to be carefully tested in a limited, controlled environment. Therefore, a five phase technology transfer process is proposed.



Phase 1 Needs assessment - In this phase the needs for change and the options for meeting those needs are identified. The acceptance of the transfer process by the participants is also obtained.

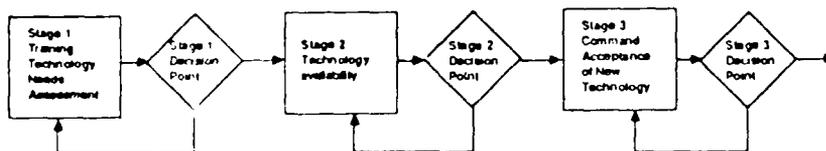
Phase 2 Developing or adopting a training innovation - In this phase a new training innovation is either developed or adopted and plans for initial testing are made.

Phase 3 Initial testing - In this phase the new innovation is tested in a controlled environment to provide data on adequacy of delivery, student outcomes, and costs. Plans for field testing are made.

Phase 4 Expanded use (field testing) - In this phase the innovation is tested in a field environment to provide data on adequacy of delivery, student outcomes, and costs. Plans for routinization are made.

Phase 5 Routinized use - In this phase, routine use of the innovation is implemented and monitored. Lessons learned are documented.

Each of the five phases of the transfer process is divided into three stages, with a decision point at the end of each stage. Each stage consists of a set of activities which leads to the decision point. Activities are not necessarily performed sequentially within a stage. A set of roles and responsibilities for each of the TTFA representatives is identified for each activity. The exact sequence of the activities may vary considerably for different training technology implementations. Each TTFA representative will frequently need to be working on multiple activities concurrently.



## 2.2 Use of the Guidelines

### 2.2.1 Introduction

The guidelines for each phase are presented as follows. An introduction to each phase is provided which includes a statement of objectives, brief description of the purpose of the phase, and a brief description of the stages for that phase. The activities for each stage, followed by the stage decision point, are then presented. Associated with each listed activity is a set of roles and responsibility assignments for each of the major participants expected to be involved in the transfer process. The decision point represents a critical milestone in the transfer process. If the criteria for the milestone are met the process proceeds to the next stage or phase. If the criteria for the milestone are not met, revision, reassessment or termination of the process is required. Following each stage presentation is a summary of the activities and decision point for that stage.

### 2.2.2 Participants

The following participants were identified as playing a major role in the transfer process.

#### Army Research Institute (ARI) Participants

The ARI project office responsible for the TTFA representative. (ARI HQ)

The ARI TTFA representative and scientific support staff. (ARI TTFA REP)

#### Training Doctrine and Command (TRADOC) Participants

The Training and Doctrine Command Headquarters office. (TRADOC HQ)

The Training Technology Agency (TTA) office. (TTA)

The TRADOC TTFA representative and technical support staff. (TRADOC TTFA REP)

#### Proponent School Participants

The Proponent School Headquarters office. (SCHOOL HQ)

The Directorate of Training and Doctrine office. (DOTD)

The Directorate of Evaluation and Standards office. (DOES)

The School TTFA representative and technical support staff. (SCHOOL TTFA REP)

The Training Department responsible for the course in which the technology will be implemented. (TRAINING DEPT)

### 2.2.3 Roles and Responsibilities

Four basic types of roles and responsibilities were defined for the participants as follows.

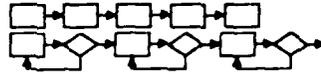
- |  |  |
|--|--|
| Prime Responsibility                   | Indicated participant has the prime responsibility for executing the activity and providing direction to support participants. Except in the very early activities and the final activities of the transfer process, one of the TTFA representatives generally takes this responsibility.  |
| Support Responsibility                 | Indicated participant has the role of supporting the prime participant as directed. This responsibility is necessary as most activities require interface across organizational boundaries.  |
| Review and Coordination Responsibility | Indicated participant has the responsibility to coordinate efforts of participants across organizational boundaries, arbitrate or delegate arbitration of problems, and review progress and final results of the activity. Often more than one participant is assigned this role/responsibility. In this case the participant in the same organization as the prime responsibility has the prime review and coordination responsibility. |
| Information Role                       | This category is established to ensure that concerned participants not directly involved in an activity are kept abreast of the activities of the transfer process. Thus, the indicated participants for this role are to receive reports or to be briefed on the progress and results of the activities. Indicated organizations, although not directly involved in corresponding activity, must be briefed or provided reports.        |

### 2.2.4 Activities and Decision Points

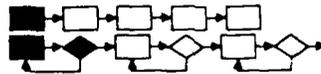
As previously stated, the activities for a phase are divided into stages with a decision point at the end of each stage. If any of the activities within a stage can be performed in parallel, they should be performed in parallel. Do not proceed to the next stage until the decision point criteria for previous stages have been met unless the criteria direct continuing with the activities of following stages or phases. Remember, the activities presented here represent the full set of activities necessary for successful technology transfer. Depending upon the nature and extent of the technology, it may not be necessary to perform all of the activities. Before skipping an activity, be sure that participants are in agreement.

### 2.2.5 Process Diagrams

The diagrams shown below provide a visual aid to help you remember where you are in the transfer process. These diagrams are presented on the introduction page of each phase, at the top of each page describing an activity, at each decision point presentation, and on each stage summary page.

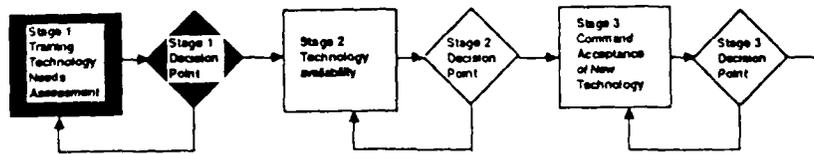


The five boxes in the upper diagram represent the five phases. The forms in the lower diagram represent the three stages (boxes) and decision points (diamonds) in each phase. These guidelines will use these diagrams, along with shading, to show where the activity is in the process. Thus, the following diagram



identifies Phase 1, stage 1.

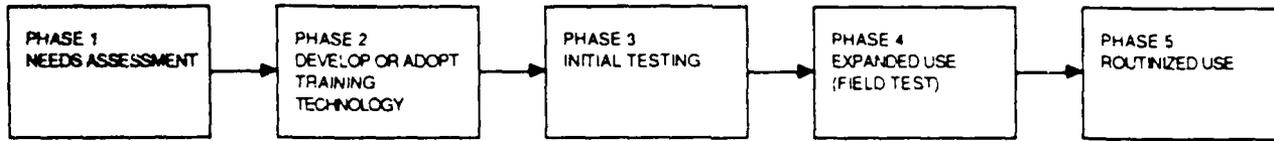
The diagram shown below is presented at each decision point and identifies the stage for which the decision point is being given.



In this example the diagram identifies the decision point for stage 1 of phase 1.

2.3 Phase 1 Guidelines

## PHASE 1 NEEDS ANALYSES



### OBJECTIVES:

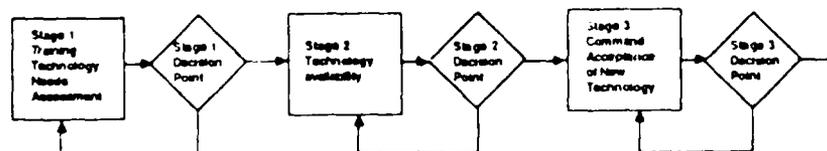
1. To identify needs for change in existing training system.
2. To identify options for meeting the identified needs.
3. To identify participants in the transfer process and gain their acceptance in new technology.

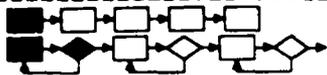
### PURPOSE:

A key initial step in the successful use of new training methods is to systematically analyze the existing situation, for evidence of areas of weakness. In essence, "If it ain't broke, don't fix it." Simply because a new technology is available does not mean it will do a more effective job than the existing methods. A thorough needs assessment should include analysis of the trainees, the preferred roles of the trainers, and the training environment, as well as the strengths and weaknesses of available alternative methods. If a training package is introduced which does not match the needs and capabilities of that situation, it is not likely to be successfully implemented even with extensive technology transfer agent effort.

### STAGES:

Stage 1 activities address the assessment of a need for a new training technology. Stage 2 activities address the availability of new technology to meet the defined needs. Stage 3 activities address the identification of participants in the transfer process and the resources necessary for the transfer process.





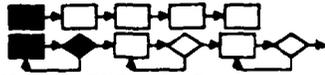
PHASE 1 NEEDS ASSESSMENT  
 STAGE 1 TRAINING TECHNOLOGY NEEDS ASSESSMENT

ACTIVITY 1. Plan scope of data to be collected with decision on formal vs. informal methods.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ		SCHOOL HQ
INFORMATION		TRADOC HQ TTA	DOTD DOES TRAINING DEPT

As the research arm of the transfer team ARI has the responsibility for this activity with the ARI TTFA representative taking the lead and being supported by the TRADOC and School representatives. Coordination and review is primarily the responsibility of the ARI Headquarters with the School Headquarters also involved in the review cycles. The remaining organizations are to be briefed or provided reports.



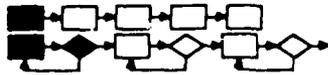
=====  
 PHASE 1 NEEDS ASSESSMENT  
 STAGE 1 TRAINING TECHNOLOGY NEEDS ASSESSMENT  
 =====

ACTIVITY 2. Collect data for needs assessment analysis.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP DOTD TRAINING DEPT
REVIEW AND COORD.	ARI HQ	TTA	
INFORMATION		TRADOC HQ	SCHOOL HQ DOES

This activity is the primary responsibility of the ARI representative with support from the TRADOC and School representatives. The ARI Headquarters has the coordination and review responsibility with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



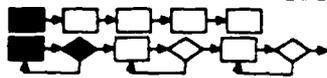
=====  
 PHASE 1 NEEDS ASSESSMENT  
 STAGE 1 TRAINING TECHNOLOGY NEEDS ASSESSMENT  
 =====

ACTIVITY 3. Examine target learner populations, including backgrounds, performance, time use, and satisfaction with current methods.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			DOTD
SUPPORT			DOES TRAINING DEPT TTFA REP
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	

This activity is seen as an ongoing effort on the part of the School to ensure that the input standards are being met or to point up a need for upgrading or down)grading input standards. In this activity the School takes the primary role and responsibility. DOTD within the School would have the primary responsibility for collecting the data with DOES and DOTD providing the data. The School TTFA representative should be available for coordinating support, providing reports and briefing the activity as necessary. School Headquarters should provide review of the activity progress and arbitrate any problems. The remaining organizations receive reports or briefings on the progress and results of this effort.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 1 TRAINING TECHNOLOGY NEEDS ASSESSMENT

ACTIVITY 4. Examine trainer's roles, needs and satisfactions with current methods and potential new methods.

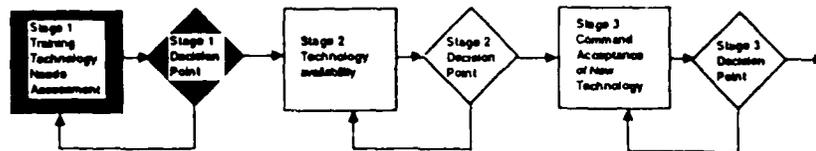
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			DOTD
SUPPORT			DOES TRAINING DEPT TTFA REP
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	

This activity is also seen as an ongoing effort on the part of the school to get input from the instructors concerning instructional needs and potential requirements. Again, the school takes the primary role and responsibility for this activity. DOTD within the school should have the primary responsibility for collecting the data with the training department providing the data. The school TTFA rep should be available for coordinating support, providing reports and briefing the activity as necessary. School headquarters should provide review of the activity progress and arbitrate any problems. The remaining organizations are to receive reports or briefings on the progress and results of this effort.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 1 TRAINING TECHNOLOGY NEEDS ASSESSMENT

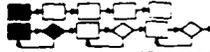


DECISION POINT

Is there a need for training technology change?

If YES, proceed to Phase 1, Stage 2 activities.

If NO, continue monitoring student and trainer needs and perform needs analyses periodically.



SUMMARY: PHASE 1, NEEDS ASSESSMENT  
STAGE 1, TRAINING TECHNOLOGY NEEDS ASSESSMENT

1.1.1 Plan scope of data to be collected with decision on formal vs. informal methods.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DDTD DOES TRAINING DEPT

1.1.2. Collect data for needs assessment analysis.

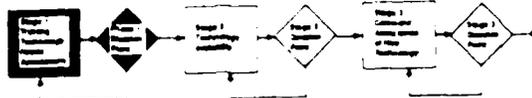
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP DDTD TRAINING DEPT
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOES

1.1.3 Examine target learner populations, including backgrounds, performance, time use, and satisfaction with current methods.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			DDTD
SUPPORT			DOES TRAINING DEPT TTFA REP.
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	SCHOOL HQ

1.1.4 Examine trainer's roles, needs and satisfactions with current methods and potential new methods.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			DDTD
SUPPORT			DOES TRAINING DEPT TTFA REP.
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	SCHOOL HQ

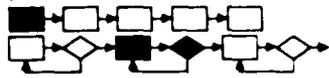


DECISION POINT

Is there a need for training technology change?

If YES, proceed to Phase 1, Stage 2 activities

If NO, continue identifying student and trainer needs and perform needs analysis and analysis



PHASE 1 NEEDS ASSESSMENT  
 STAGE 2 TECHNOLOGY AVAILABILITY

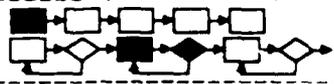
ACTIVITY 1. Identify potential alternatives to current technologies

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	
INFORMATION		TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

As the research arm of the transfer team ARI has the responsibility for this activity with the ARI TTFA representative taking the lead and being supported by the TRADOC and School representatives. Coordination and review is primarily the responsibility of the ARI Headquarters with the TTA also involved in the review cycles. The remaining organizations are to be briefed or provided reports.

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PHASE 1 NEEDS ASSESSMENT  
 STAGE 2 TECHNOLOGY AVAILABILITY

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ACTIVITY 2. Identify resources necessary for potential technology transfer.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

The TRADOC TIFA representative takes the lead for this activity with support from the ARI and school representatives. Primary coordination and review responsibility is with the TTA with additional review from the ARI Headquarters and the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 2 TECHNOLOGY AVAILABILITY

ACTIVITY 3. Obtain training developers to analyze courseware availability, capability, and needs.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTA	
REVIEW AND COORD.		TRADOC HQ	
INFORMATION	ARI HQ TTFA REP		SCHOOL HQ DOTD DOES TRAINING DEPT

The TRADOC TTFA representative has the prime responsibility to task the training developers at this stage of the transfer process. The TTA has the support responsibility to provide the training developers. Review and coordination is the responsibility of TRADOC HQ. The remaining organizations are to be briefed or provided reports.



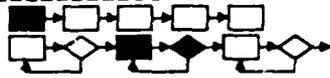
PHASE 1 NEEDS ASSESSMENT  
 STAGE 2 TECHNOLOGY AVAILABILITY

ACTIVITY 4. Obtain appropriate hardware/software systems personnel to analyze hardware/software availability, capability, and needs.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT		TTA	
REVIEW AND COORD.		TRADOC HQ	
INFORMATION	ARI HQ TTFA REP		SCHOOL HQ DOTD DOES TRAINING DEPT TTFA REP

The TRADOC TTFA representative has the prime responsibility to task the hardware/software system personnel at this stage of the transfer process. The TTA has the support responsibility to provide the training developers. Review and coordination is the responsibility of TRADOC HQ. The remaining organizations are to be briefed or provided reports.



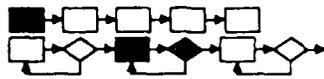
PHASE 1 NEEDS ASSESSMENT  
 STAGE 2 TECHNOLOGY AVAILABILITY

ACTIVITY 5. Examine alternatives to current use. (i.e., hardware, software, and courseware.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

This activity is seen as the primary responsibility of the TTFA with the ARI rep taking the lead and being supported by the TRADOC and School reps. Review and coordination is accomplished by the ARI Headquarters with TTA and School HQ also reviewing results. The remaining organizations are to be provided reports or briefed.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 2 TECHNOLOGY AVAILABILITY

ACTIVITY 6. Analyze likely costs of proposed alternatives.

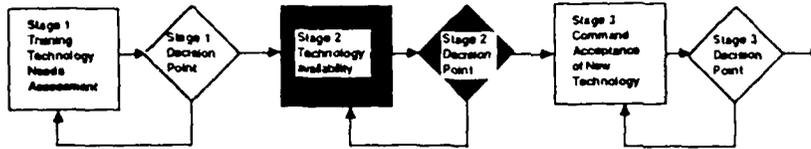
ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

Since the School is the prime source for costing use of alternatives, the School representative takes the lead for this activity and is supported by ARI and TRADOC representatives for cost data available outside the school. Review and coordination is the responsibility of the School HQ with additional reviews being conducted by the TTA, since they will ultimately have to fund the transfer. The remaining organizations are to be briefed or provided reports.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 2 TECHNOLOGY AVAILABILITY

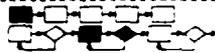


DECISION POINT

Are there viable new technologies to meet needs or can new technologies be developed in time to meet the need?

If YES proceed to Stage 3 activities.

If NO, Continue using current technologies.



SUMMARY: PHASE 1, NEEDS ASSESSMENT  
STAGE 2, TECHNOLOGY AVAILABILITY

1.2.1 Identify potential alternatives to current technologies

ROLE/RESPON.	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.2.2 Identify resources necessary for potential technology transfer.

ROLE/RESPON.	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.2.3 Obtain training developers to analyze courseware availability, capability, and needs.

ROLE/RESPON.	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTA	
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.2.4 Obtain appropriate hardware/software systems personnel to analyze hardware/software availability, capability, and needs.

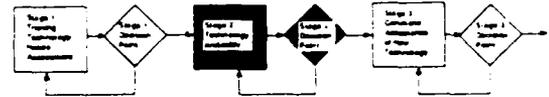
ROLE/RESPON.	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTA	
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT TTFA REP

1.2.5 Examine alternatives to current use, i.e., hardware, software, and courseware.

ROLE/RESPON.	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.2.6 Analyze likely costs of proposed alternatives.

ROLE/RESPON.	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTA	
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

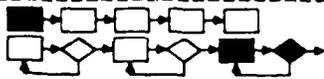


DECISION POINT

Are there viable new technologies to meet needs or can new technologies be developed in time to meet the need?

If YES proceed to Stage 3 activities.

If NO, Continue using current technologies.



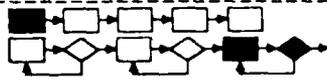
PHASE 1 NEEDS ASSESSMENT  
 STAGE 3 COMMAND ACCEPTANCE OF NEW TECHNOLOGY

ACTIVITY 1. Identify those organizations to be involved in the transfer process.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

With the school being the ultimate user proponent of the new technology, the School TTFA representative takes the lead for this activity with support from the other representatives in identifying those organizations outside of the school to be involved in the transfer process. Primary review and coordination responsibility is with the School Headquarters with additional reviews by the TTA and ARI Headquarters. The remaining organizations are to be briefed or provided reports.



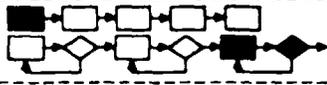
PHASE 1 NEEDS ASSESSMENT  
 STAGE 3 COMMAND ACCEPTANCE OF NEW TECHNOLOGY

ACTIVITY 2. Make contact with those identified organizations and parties to be involved as early as possible.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

This activity is the primary responsibility of the TRADOC representative with support from the ARI and School representatives. Primary coordination and review responsibility is with the TTA with additional review by school. The remaining organizations are to be briefed or provided reports.



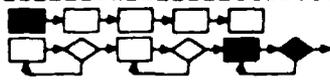
PHASE 1 NEEDS ASSESSMENT  
 STAGE 3 COMMAND ACCEPTANCE OF NEW TECHNOLOGY

ACTIVITY 3. Identify sources of resources for transfer process.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

This activity is the primary responsibility of the TRADOC representative with support from the ARI and School representatives. The TTA has the primary responsibility for coordination and review with the School Headquarters having additional review. The remaining organizations are to be briefed or provided reports.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 3 COMMAND ACCEPTANCE OF NEW TECHNOLOGY

ACTIVITY 4. Examine command interests in use of new methods, especially ARI vs. TRADOC vs. School; look for competing priorities.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementing arm of the transfer team, the TRADOC representative takes the lead for this activity, again supported by the other TTFA representatives. Review and coordination is the responsibility of the TTA with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 3 COMMAND ACCEPTANCE OF NEW TECHNOLOGY

ACTIVITY 5. Communicate needs analyses and recommendations to all involved parties.

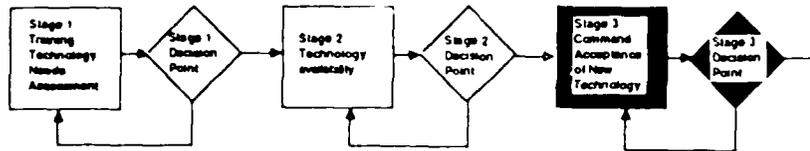
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

This activity is the primary responsibility of the TRADOC representative with support from the ARI and School representatives. The TTA has the primary responsibility for coordination and review with the ARI and School Headquarters having additional review. The remaining organizations are to be briefed or provided reports.



PHASE 1 NEEDS ASSESSMENT  
 STAGE 3 COMMAND ACCEPTANCE OF NEW TECHNOLOGY



DECISION POINT

Is there command acceptance of the new technology?

If yes, proceed with Phase 2 of the Transfer process.

If No, assess objections and:

- 1) Revise and resubmit recommendations or
- 2) Reassess the need for a new technology.

.....  
 SUMMARY: PHASE 1, NEEDS ASSESSMENT  
 STAGE 3, COMMAND ACCEPTANCE OF NEW TECHNOLOGY  
 .....

1.3.1 Identify those organizations to be involved in the transfer process.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.3.2 Make contact with those identified organizations and parties to be involved as early as possible.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.3.3 Identify sources of resources for transfer process.

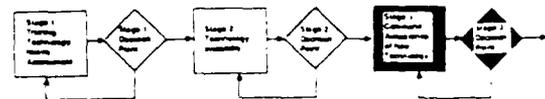
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.3.4 Examine command interests in use of new methods, especially ARI vs. TRADOC vs. School; look for competing priorities.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT

1.3.5 Communicate needs analyses and recommendations to all involved parties.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DDES TRAINING DEPT



DECISION POINT

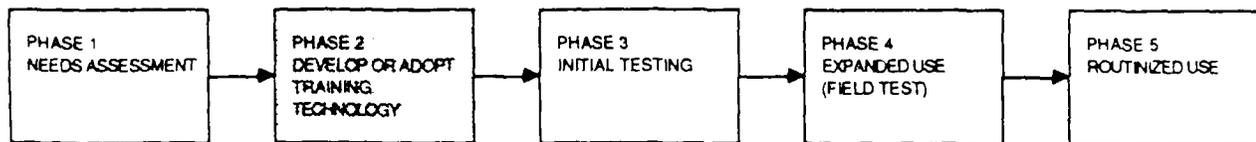
Is there command acceptance of the new technology?

If yes, proceed with Phase 2 of the Transfer process.

If No, assess objections and:  
 1) Revise and resubmit recommendations or  
 2) Reassess the need for a new technology.

## 2.4 Phase 2 Guidelines

**PHASE 2  
DEVELOP OR ADOPT TRAINING INNOVATION**



**OBJECTIVES:**

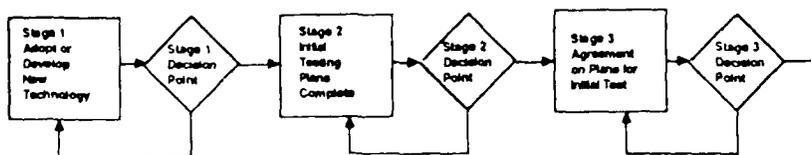
1. To develop training option; or
2. To complete development of new innovation.
3. To complete plans for initial field testing.

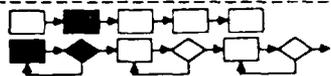
**PURPOSE:**

Numerous activities are needed to decide what new training technology to use, to develop or modify the specifics of the selected training technology, and to plan for an initial field trial of the selected training technology. Even with an "off-the-shelf" training package, the decision processes needed to initiate it may be quite involved within an organization as complex as TRADOC. If the training innovation must be developed or modified, this phase can encompass the lengthy process of materials creation and testing. Following the decision process and/or training technology development period, careful planning for the initial field testing is required.

**STAGES:**

Stage 1 activities address the selection or adoption of a new technology. Stage 2 activities address the development of plans for conducting the initial testing of phase 3. Stage 3 activities address the necessary concurrence of all responsible parties before continuing with Phase 3.





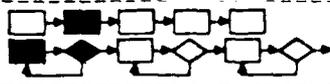
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 1 ADOPT OR DEVELOP NEW TECHNOLOGY

ACTIVITY 1. Analyze extent to which proposed new method(s) appear to match learners' needs and capabilities.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DGTD DOES TRAINING DEPT

As the research arm of the transfer team, the ARI representative has the primary responsibility for this activity with support from the TRADOC and School representatives. ARI Headquarters has the primary responsibility for review and coordination with the TTA and School Headquarters also involved in the review cycle. The remaining organizations are to be briefed or provided reports.



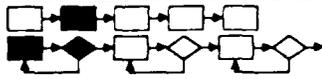
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 1 ADOPT OR DEVELOP NEW TECHNOLOGY

ACTIVITY 2. Assess match of new method(s) with preferred training styles, capabilities; estimate extent of trainer training needed for initial test.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

As the research arm of the transfer team, the ARI representative has the primary responsibility for this activity with support from the TRADOC and School representatives. ARI Headquarters has the primary responsibility for review and coordination with the TTA and School Headquarters also involved in the review cycle. The remaining organizations are to be briefed or provided reports



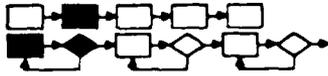
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 1 ADOPT OR DEVELOP NEW TECHNOLOGY

ACTIVITY 3. Examine specific training delivery mechanisms and components.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DOTD DOES TRAINING DEPT

As the research arm of the transfer team ARI has the responsibility for this activity with the ARI TTFA representative taking the lead and being supported by the TRADOC and School representatives. Coordination and review is primarily the responsibility of the ARI Headquarters with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



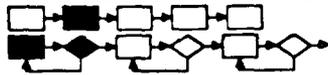
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 1 ADOPT OR DEVELOP NEW TECHNOLOGY

ACTIVITY 4. Identify all required resources whether available or to be acquired, and their estimated costs.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.		TTA	
INFORMATION	ARI HQ	TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination. The remaining organizations are to be briefed or provided reports.



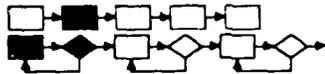
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 1 ADOPT OR DEVELOP NEW TECHNOLOGY

ACTIVITY 5. Negotiate with interested parties to obtain agreement on training innovation to be tested.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



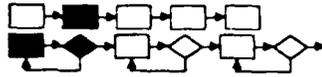
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 1 ADOPT OR DEVELOP NEW TECHNOLOGY

ACTIVITY 6. Provide appropriate systems staff to advise on hardware/software capabilities, resources needed and their costs.

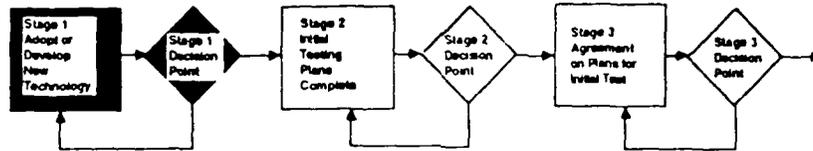
ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	
INFORMATION	ARI HQ	TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination. The remaining organizations are to be briefed or provided reports.



PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 1 ADOPT OR DEVELOP NEW TECHNOLOGY

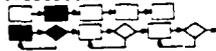


DECISION POINT

Have all responsible parties agreed to adopt or develop a new technology?

If YES, proceed to Stage 2

If NO, assess objections and resubmit plans for obtaining new technology.



Summary: Phase 2, DEVELOP OR ADOPT TRAINING INNOVATION  
 Stage 1, ADOPT OR DEVELOP NEW TECHNOLOGY

2.1.1 Analyze extent to which proposed new method(s) appear to match learners' needs and capabilities.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ
			DOTD DOES TRAINING DEPT

2.1.2 Assess match of new method(s) with preferred training styles, capabilities; estimate extent of trainer training needed for initial test.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ
			DOTD DOES TRAINING DEPT

2.1.3 Examine specific training delivery mechanisms and components.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ
			DOTD DOES TRAINING DEPT

2.1.4 Identify all required resources whether available or to be acquired, and their estimated costs.

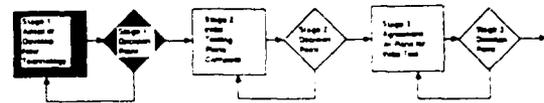
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ
			DOTD DOES TRAINING DEPT

2.1.5 Negotiate with interested parties to obtain agreement on training innovation to be tested.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ
			DOTD DOES TRAINING DEPT

2.1.6 Provide appropriate systems staff to advise on hardware/software capabilities, resources needed and their costs.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ
			DOTD DOES TRAINING DEPT

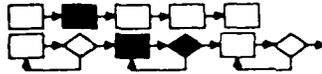


DECISION POINT

Have all responsible parties agreed to adopt or develop a new technology?

If YES, proceed to Stage 2

If NO, assess objections and resubmit plans for obtaining new technology.



PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 2 INITIAL TESTING PLANS COMPLETE

ACTIVITY 1. Plan for trial instructional delivery and equipment maintenance.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	
INFORMATION		TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the ARI Headquarters. The remaining organizations are to be briefed or provided reports.





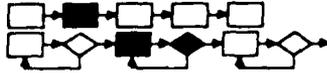
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 2 INITIAL TESTING PLANS COMPLETE

ACTIVITY 3. Plan data analysis methods and resources needed.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ		SCHOOL HQ
INFORMATION		TRADOC HQ TTA	DOTD DOES TRAINING DEPT

As the research arm of the transfer team ARI has the responsibility for this activity with the ARI TTFA representative taking the lead and being supported by the TRADOC and School representatives. Coordination and review is primarily the responsibility of the ARI Headquarters with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



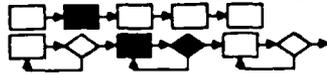
=====  
 PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 2 INITIAL TESTING PLANS COMPLETE  
 =====

ACTIVITY 4. Collect pilot data for try-out of data collection instrument

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP TRAINING DEPT
REVIEW AND COORD.	ARI HQ		SCHOOL HQ
INFORMATION		TRADOC HQ TTA	DOTD DOES

As the research arm of the transfer team ARI has the responsibility for this activity with the ARI TTFA representative taking the lead and being supported by the TRADOC and School representatives and the Training Department. Coordination and review is primarily the responsibility of the ARI Headquarters with additional reviews by the School Headquarters. The remaining organizations are to be briefed or provided reports.



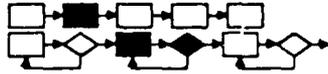
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 2 INITIAL TESTING PLANS COMPLETE

ACTIVITY 5. Assemble resources needed for initial test.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	
INFORMATION		TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the ARI Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 2 INITIAL TESTING PLANS COMPLETE

ACTIVITY 6. Provide training developers to develop or modify training course content.

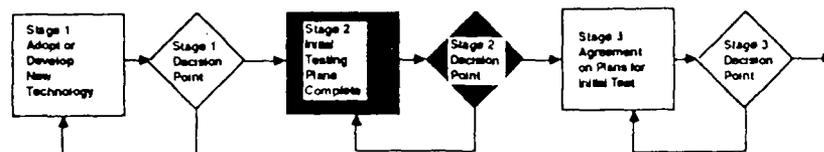
ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	DOTD TRAINING DEPT
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ TTA	DOES

As the user proponent arm of the transfer team, the School TTFA representative takes the responsibility for this activity with support from the ARI and TRADOC representatives, DOTD, and the Training Department. Coordination and review is the responsibility of the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 2 INITIAL TESTING PLANS COMPLETE



DECISION POINT

Have the plans for initial testing been completed?

If YES, proceed to stage 3.

If NO, proceed to stage 3, only on the assurance that the plans will be completed before the completion of stage 3.



Summary: Phase 2, DEVELOP OR ADOPT TRAINING INNOVATION  
 Stage 2, INITIAL TESTING PLANS COMPLETE

2.2.1 Plan for trial instructional delivery and equipment maintenance.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

2.2.2 Design data collection procedures, including procedures for monitoring delivery and measures for assessing learners outcomes.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DDTD DOES TRAINING DEPT

2.2.3 Plan data analysis methods and resources needed.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DDTD DOES TRAINING DEPT

2.2.4 Collect pilot data for try-out of data collection instrument

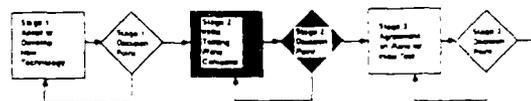
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP TRAINING DEPT
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DDTD DOES

2.2.5 Assemble resources needed for initial test

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

2.2.6 Provide training developers to develop or modify training course content

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT			DDTD TRAINING DEPT
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DOES

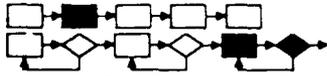


DECISION POINT

Have the plans for initial testing been completed?

If YES, proceed to stage 3.

If NO, proceed to stage 3, only on the assurance that the plans will be completed before the completion of stage 3.



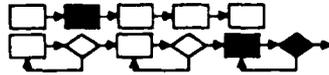
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 3 AGREEMENT ON PLANS FOR INITIAL TEST

ACTIVITY 1. Identify likely support sources and barriers to initial trial.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ TTA	DOTD DOES TRAINING DEPT

As the proponent user arm of transfer team, the School TTFA representative has the responsibility for this activity with ARI and TRADOC TTFA representatives supporting. Coordination and review is the prime responsibility of School Headquarters. The remaining organizations are to be briefed or provided reports.



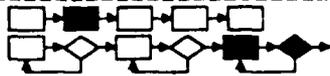
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 3 AGREEMENT ON PLANS FOR INITIAL TEST

ACTIVITY 2. Open communication channels among all of the activities identified as being involved in the transfer process.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	
INFORMATION	ARI HQ	TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination. The remaining organizations are to be briefed or provided reports.



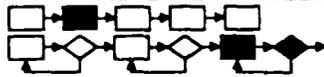
PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 3 AGREEMENT ON PLANS FOR INITIAL TEST

ACTIVITY 3. Interface with all parties on the nature of the new training, its expected benefits, and resources needed for the trial use

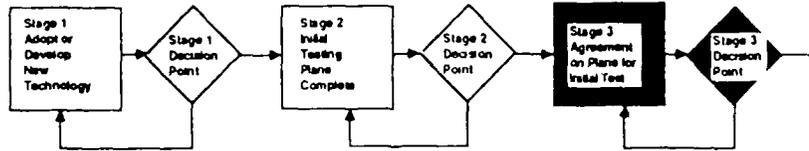
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.		TTA	
INFORMATION	ARI HQ	TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

The implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination. The remaining organizations are to be briefed or provided reports.



PHASE 2 DEVELOP OR ADOPT TRAINING INNOVATION  
 STAGE 3 AGREEMENT ON PLANS FOR INITIAL TEST

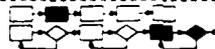


DECISION POINT

Have the plans for initial testing been completed?

If YES, proceed to stage 3.

If NO, proceed to stage 3, only on the assurance that the plans will be completed before the completion of stage 3.



Summary: Phase 2, DEVELOP OR ADOPT TRAINING INNOVATION  
 Stage 3, AGREEMENT ON PLANS FOR INITIAL TEST

2.3.1 Identify likely support sources and barriers to initial trial.

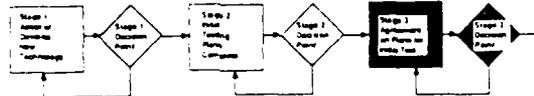
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DOTD DOES TRAINING DEPT

2.3.2 Open communication channels among all of the activities identified as being involved in the transfer process.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

2.3.3 Interface with all parties on the nature of the new training, its expected benefits, and resources needed for the trial use

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT



DECISION POINT

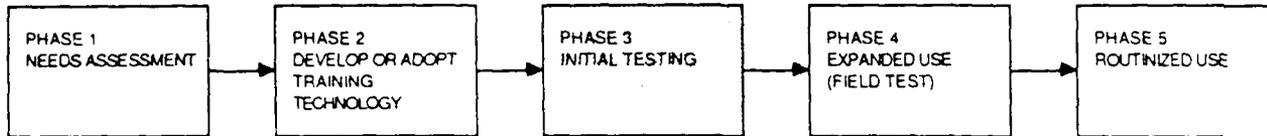
Are all responsible parties in agreement with the plans for initial testing?

If YES, proceed to Phase 3

If NO, assess objections and resubmit plans.

2.5 Phase 3 Guidelines

### PHASE 3 INITIAL TESTING



#### OBJECTIVES:

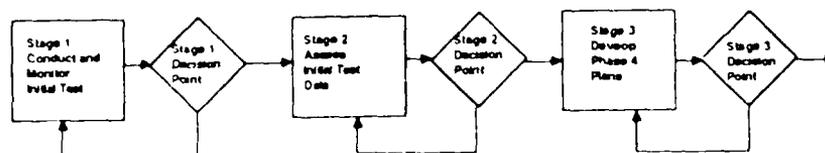
1. To test the innovation using the target population,
2. To provide evidence of adequate delivery learner outcomes and costs incurred,
3. To complete plans for field testing.

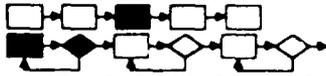
#### PURPOSE:

This phase initiates the use of the new training technology under controlled conditions. It includes information collection about the accuracy of delivery, the reactions of participants, and the outcomes for learners. If the training package has already been developed and fully tested elsewhere, this phase might be shortened to a rapid examination of its feasibility within the new situation. The aim of this phase is to determine if the new training can be effective in producing the desired learning outcomes, under conditions of full support and extensive feedback. If the training technology is not effective within these conditions, then it should not go to the next phase. Instead, analysis is needed to uncover the reasons for low effectiveness. Such analysis might call for further development of the training technology, modification of parts of the training environment, or scrapping the training technology entirely, all examples of reasons not to proceed to the next phase.

#### STAGES:

Stage 1 activities address the conduct and monitoring of the initial testing. Stage 2 activities address the assessment of the data from the initial testing. Stage 3 activities address the development of plans for the conduct of phase 4.





PHASE 3 INITIAL TESTING  
 STAGE 1 CONDUCT AND MONITOR INITIAL TEST

ACTIVITY 1. Conduct training and act as go-between to solve problems hampering instructional delivery.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	TRAINING DEPT
REVIEW AND COORD.		TTA	SCHOOL HQ DOTD
INFORMATION	ARI HQ	TRADOC HQ	DOES

As the user proponent arm of the transfer team, the School TTFA representative takes the responsibility for this activity with support from the ARI and TRADOC representatives and the Training Department. Coordination and review is the responsibility of the School Headquarters with additional review by DOTD and the TTA. The remaining organizations are to be briefed or provided reports.



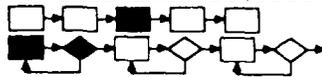
PHASE 3 INITIAL TESTING  
 STAGE 1 CONDUCT AND MONITOR INITIAL TEST

ACTIVITY 2. Collect data to monitor accuracy of training delivery; collect outcome data from trainees.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP TRAINING DEPT
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES

As the research arm of the transfer team, ARI has the responsibility for this activity with the ARI TTFA representative taking the lead and being supported by the TRADOC and School representatives and the Training Department Coordination and review is primarily the responsibility of the ARI Headquarters with additional reviews by the TTA and School Headquarters. The remaining organizations are to brief or provided reports.



=====  
 PHASE 3 INITIAL TESTING  
 STAGE 1 CONDUCT AND MONITOR INITIAL TEST  
 =====

ACTIVITY 3. Provide trainers for conducting training and training developers available for problem solving and minor modifications.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	TRAINING DEPT
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ TTA	DOTD DOES

As the user proponent arm of the transfer team, the School TTFA representative takes the responsibility for this activity with support from the ARI and TRADOC representatives and the Training Department. Coordination and review is the responsibility of the School Headquarters. The remaining organizations are to be briefed or provided reports.



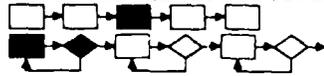
PHASE 3 INITIAL TESTING  
 STAGE 1 CONDUCT AND MONITOR INITIAL TEST

ACTIVITY 4. Provide hardware and software support staff for maintenance activities.

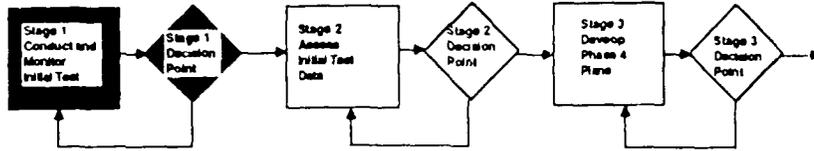
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		ITFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementer, the TRADOC ITFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 3 INITIAL TESTING  
 STAGE 1 CONDUCT AND MONITOR INITIAL TEST



DECISION POINT

Is initial testing providing data needed for assessment?

If YES, proceed with data collection and begin stage 3 activities.

If NO, discontinue testing and reassess technology implementation and testing design.



Summary: Phase 3, INITIAL TESTING  
 Stage 1, CONDUCT AND MONITOR INITIAL TEST

3.1.1 Conduct training and act as go-between to solve problems hampering instructional delivery.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	TRAINING DEPT
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DDTD DOES

3.1.2 Collect data to monitor accuracy of training delivery; collect outcome data from trainees.

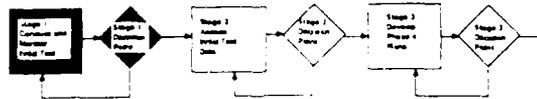
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		TTFA REP
SUPPORT		TTFA REP	TRAINING DEPT
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DDTD DOES

3.1.3 Provide trainers for conducting training and training developers available for problem solving and minor modifications.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	TRAINING DEPT
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DDTD DOES

3.1.4 Provide hardware and software support staff for maintenance activities.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DDTD DOES TRAINING DEPT

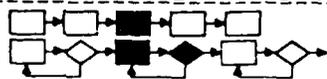


DECISION POINT

Is initial testing providing data needed for assessment?

If YES, proceed with data collection and begin stage 3 activities.

If NO, discontinue testing and reassess technology implementation and testing design.



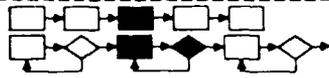
PHASE 3 INITIAL TESTING  
 STAGE 2 ASSESS INITIAL TEST DATA

ACTIVITY 1. Arrange for data processing support computer facilities, software, analysis staff, etc.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

As the research arm of the transfer team ARI has the responsibility for this activity with the ARI TTFA representative taking the lead and being supported by the TRADOC and School representatives. Coordination and review is primarily the responsibility of the ARI Headquarters with additional reviews by the TTA and School Headquarters. The remaining organizations are to be briefed or provided reports.



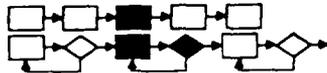
PHASE 3 INITIAL TESTING  
 STAGE 2 ASSESS INITIAL TEST DATA

ACTIVITY 2. Plan for interim feedback to interested parties on progress of training, any problems occurring reactions of participants, etc.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

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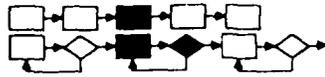
PHASE 3 INITIAL TESTING  
 STAGE 2 ASSESS INITIAL TEST DATA

ACTIVITY 3. Analyze and summarize data on learners outcomes, and on perceptions of new training.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	
INFORMATION		TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

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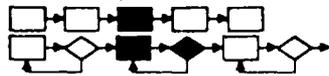
PHASE 3 INITIAL TESTING  
 STAGE 2 ASSESS INITIAL TEST DATA

ACTIVITY 4. Analyze and summarize data on accuracy of training delivery; on problems encountered; and on trainers likes and dislikes.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	OOTO DOES TRAINING DEPT

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PHASE 3 INITIAL TESTING  
 STAGE 2 ASSESS INITIAL TEST DATA

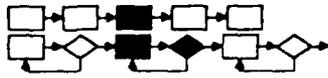
ACTIVITY 5. Assess performance characteristics of hardware, software, and courseware.

ROLES AND RESPONSIBILITIES

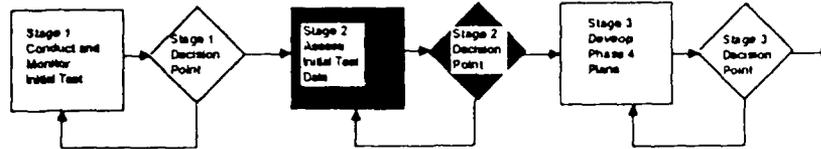
ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

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 PHASE 3 INITIAL TESTING  
 STAGE 2 ASSESS INITIAL TEST DATA  
 =====

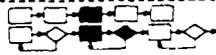


DECISION POINT

Does the data provide evidence of adequate delivery, learner outcome, and costs incurred?

If YES, complete plans of stage 3 and proceed to Phase 4.

If NO, analyze shortcomings and develop plan for redoing initial testing or discontinue implementation.



Summary: Phase 3, INITIAL TESTING  
Stage 2, ASSESS INITIAL TEST DATA

3.2.1 Arrange for data processing support computer facilities, software, analysis staff, ect.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

3.2.2 Plan for interim feedback to interested parties on progress of training, any problems occurring reactions of participants, etc.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP	TTFA REP	TTFA REP
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

3.2.3 Analyze and summarize data on learners outcomes, and on perceptions of new training.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

3.2.4 Analyze and summarize data on accuracy of training delivery, on problems encountered, and on trainers likes and dislikes.

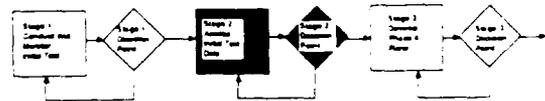
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

3.2.5 Assess performance characteristics of hardware, software, and courseware.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP	TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

3.2.6 Calculate costs of resources used, estimate economies of scale for expanded use.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP	TTFA REP	TTFA REP
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DDTD DOES TRAINING DEPT

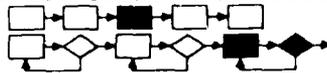


DECISION POINT

Does the data provide evidence of adequate delivery, learner outcome, and costs incurred?

If YES, complete plans of stage 3 and proceed to Phase 4.

If NO, analyze shortcomings and develop plan for redoing initial testing or to discontinue implementation.



PHASE 3 INITIAL TESTING  
 STAGE 3 DEVELOP PHASE 4 PLANS

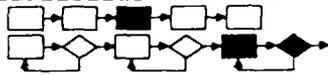
ACTIVITY 1. Plan procedures for problem identification and solution during Phase 4 instructional delivery.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters and ARI Headquarters. The remaining organizations are to be briefed or provided reports.





PHASE 3 INITIAL TESTING  
 STAGE 3 DEVELOP PHASE 4 PLANS

ACTIVITY 3. Examine barriers and supports to accurate delivery in test site under expanded use.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

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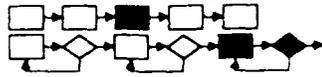
PHASE 3 INITIAL TESTING  
 STAGE 3 DEVELOP PHASE 4 PLANS

ACTIVITY 4. Monitor logistic support for expanded delivery to ensure timely availability of resources

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 3 INITIAL TESTING  
 STAGE 3 DEVELOP PHASE 4 PLANS

ACTIVITY 5. Provide interim and final reports on conduct of the limited trial, results, and costs incurred.

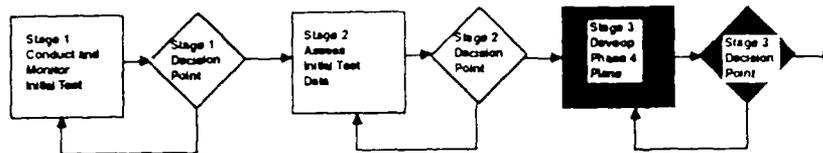
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters. The remaining organizations are to be briefed on provided reports.



PHASE 3 INITIAL TESTING  
 STAGE 3 DEVELOP PHASE 4 PLANS



DECISION POINT

Does the data provide evidence of adequate delivery, learner outcome, and costs incurred?

If YES, complete plans of stage 3 and proceed to Phase 4.

If NO, analyze shortcomings and develop plan for redoing initial testing or discontinue implementation.



Summary: Phase 3, INITIAL TESTING  
Stage 3, DEVELOP PHASE 4 PLANS

3.3.1 Plan procedures for problem identification and solution during Phase 4 instructional delivery.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

3.3.2 Arrange for staff and/or other resources needed for training monitoring and data collection.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DOTD DOES TRAINING DEPT

3.3.3 Examine barriers and supports to accurate delivery in test site under expanded use.

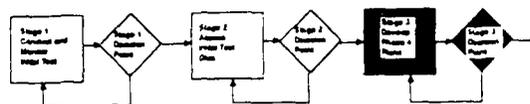
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

3.3.4 Monitor logistic support for expanded delivery to ensure timely availability of resources

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

3.3.5 Provide interim and final reports on conduct of the limited trial, results, and costs incurred.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	TTFA REP
SUPPORT	TTFA REP	TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT



DECISION POINT

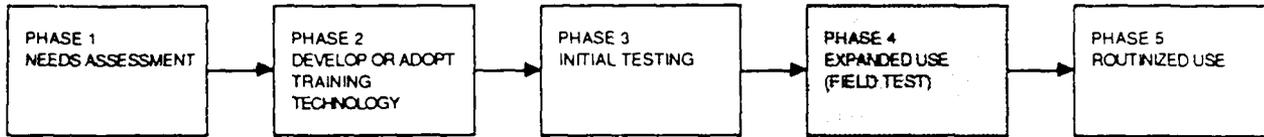
Have plans for Phase 4 activities been approved?

If YES, proceed with Phase 4.

If NO, assess objections and resubmit plans.

## 2.6 Phase 4 Guidelines

**PHASE 4  
EXPANDED USE (FIELD TEST)**



**OBJECTIVES:**

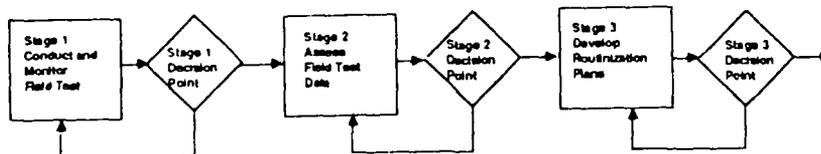
1. To transfer the innovation into the intended field environment under conditions of normal use,
2. To provide evidence of adequate delivery learner outcomes and acceptable costs.
2. To develop plans for integrating the innovation into normal use.

**PURPOSE:**

Within this phase, a new training package which "passed" initial testing is expanded to a larger number of users, with examinations of its effectiveness under "normal" conditions. Since it will still be an innovation to these new users, considerable support and problem solving will probably be needed to ensure accurate delivery. This phase should still include extensive data collection on the conditions encountered in real use, on the barriers and facilitators to full and accurate delivery, as well as on outcomes for learners. If this expanded use provides evidence of desired outcomes, then a gradual transition to routinized use can occur.

**STAGES:**

Stage 1 activities address the conduct and monitoring of the field test. Stage 2 activities address the assessment of the data from the field test. Stage 3 activities address the development of plans for integrating the innovation into normal use.









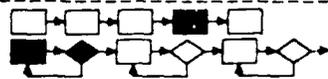
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 1 CONDUCT AND MONITOR FIELD TEST

ACTIVITY 3. Provide trainers for conducting training and training developers available for problem solving and minor modifications.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	TRAINING DEPT
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ TTA	DDTD DOES

As the user proponent arm of the transfer team, the School TTFA representative takes the responsibility for this activity with support from the ARI and TRADOC representatives and the Training Department. Coordination and review is the responsibility of the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 1 CONDUCT AND MONITOR FIELD TEST

ACTIVITY 4. Provide hardware and software support staff for maintenance activities.

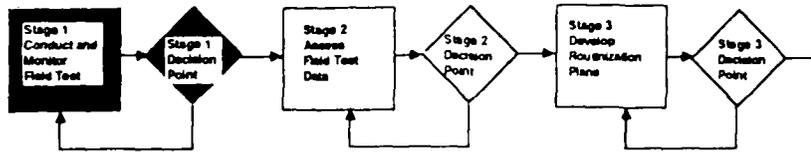
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

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 PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 1 CONDUCT AND MONITOR FIELD TEST  
 =====



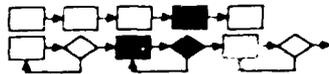
DECISION POINT

Is field test providing data needed for assessment?

If YES, proceed with data collection and begin stage 3 activities.

If NO, discontinue testing, reassess technology implementation and testing design.





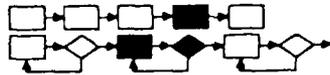
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 2 ASSESS FIELD TEST DATA

ACTIVITY 1. Arrange for data processing support computer facilities, software, analysis staff, etc.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

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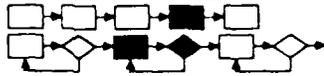
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 2 ASSESS FIELD TEST DATA

ACTIVITY 2. Plan for interim feedback to interested parties on progress of training, any problems occurring, reactions of participants, etc.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTO DOES TRAINING DEPT

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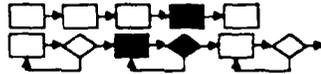
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 2 ASSESS FIELD TEST DATA

ACTIVITY 3. Analyze and summarize data on learners outcomes, and on perceptions of new training.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	
INFORMATION		TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

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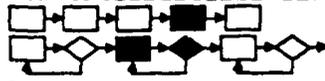
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 2 ASSESS FIELD TEST DATA

ACTIVITY 4. Analyze and summarize data on accuracy of training delivery; on problems encountered; and on trainers likes and dislikes.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

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PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 2 ASSESS FIELD TEST DATA

ACTIVITY 5. Assess performance characteristics of hardware, software, and courseware.

ROLES AND RESPONSIBILITIES

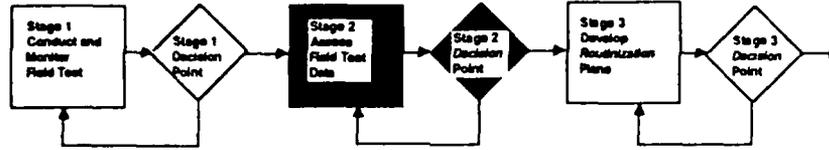
ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

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PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 2 ASSESS FIELD TEST DATA



DECISION POINT

Does the data provide evidence of adequate delivery, learner outcome, and costs incurred?

If YES, complete plans of stage 3 and proceed to Phase 5.

If NO, analyze shortcomings and develop plan for redoing field testing or discontinue implementation.



Summary: Phase 4, EXPANDED USE (FIELD TEST)  
 Stage 2, ASSESS FIELD TEST DATA

4.2.1 Arrange for data processing support computer facilities, software, analysis staff, etc.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.2.2 Plan for interim feedback to interested parties on progress of training, any problems occurring, reactions of participants, etc.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.2.3 Analyze and summarize data on learners outcomes, and on perceptions of new training.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.2.4 Analyze and summarize data on accuracy of training delivery; on problems encountered; and on trainers likes and dislikes.

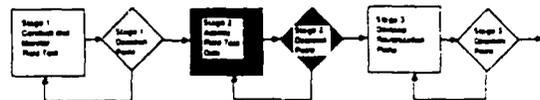
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME	TTFA REP		
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.2.5 Assess performance characteristics of hardware, software, and courseware.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.2.6 Calculate costs of resources used; estimate economies of scale for routinized use.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT



**DECISION POINT**

Does the data provide evidence of adequate delivery, learner outcome, and costs incurred?

If YES, complete plans of stage 3 and proceed to Phase 5.

If NO, analyze shortcomings and develop plan for redoing field testing or discontinue implementation.



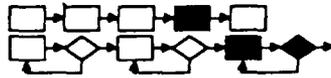
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 3 DEVELOP ROUTINIZATION PLANS

ACTIVITY 1. Plan procedures for information system to monitor and provide feedback during Phase 5 activities.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.	ARI HQ	TTA	SCHOOL HQ
INFORMATION		TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters and ARI Headquarters. The remaining organizations are to be briefed or provided reports.



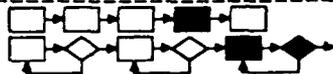
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 3 DEVELOP ROUTINIZATION PLANS

ACTIVITY 2. Plan mechanisms and staff for collecting data on accuracy of delivery and trainee outcomes.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ TTA	DOTD DOES TRAINING DEPT

As the user proponent arm of the transfer team, the School TTFA representative takes the responsibility for this activity with support from the ARI and TRADOC representatives. Coordination and review is the responsibility of the School Headquarters. The remaining organizations are to be briefed or provided reports.



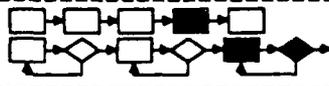
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 3 DEVELOP ROUTINIZATION PLANS

ACTIVITY 3. Examine barriers and supports and barriers under routine conditions including supervisory support, norms for training environment, competing uses for equipment, and compatibility with regulations.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the user proponent arm of the transfer team, the School TTFA representative takes the responsibility for this activity with support from the ARI and TRADOC representatives. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 3 DEVELOP ROUTINIZATION PLANS

ACTIVITY 4. Plan logistic support for routinized delivery to ensure timely availability of trainers, learners, supplies security, facilities, and equipment maintenance.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT		TTFA REP	TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



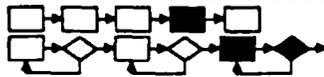
PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 3 DEVELOP ROUTINIZATION PLANS

ACTIVITY 5. Provide progress reports and outcomes of field test results.

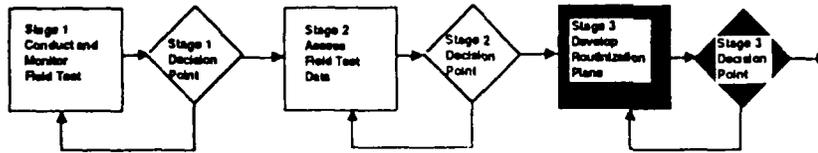
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	DOTD DOES TRAINING DEPT

As the implementation arm of the transfer team, the TRADOC TTFA representative takes the lead for this activity with the ARI and School representatives supporting. The TTA takes responsibility for review and coordination with additional review by the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 4 EXPANDED USE (FIELD TEST)  
 STAGE 3 DEVELOP ROUTINIZATION PLANS



DECISION POINT

Have plans for Phase 5 activities been approved?

If YES, proceed with Phase 5.

If NO, assess objections and resubmit plans.



Summary: Phase 4, EXPANDED USE (FIELD TEST)  
Stage 3, DEVELOP ROUTINIZATION PLANS

4.3.1 Plan procedures for information system to monitor and provide feedback during Phase 5 activities.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.3.2 Plan mechanisms and staff for collecting data on accuracy of delivery and trainee outcomes.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ TTA	SCHOOL HQ DOTD DOES TRAINING DEPT

4.3.3 Examine barriers and supports and barriers under routine conditions including supervisory support, norms for training environment, competing uses for equipment, and compatibility with regulations.

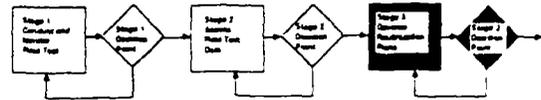
ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	
REVIEW AND COORD. INFORMATION	ARI HQ	TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.3.4 Plan logistic support for routinized delivery to ensure timely availability of trainers, learners, supplies security, facilities, and equipment maintenance.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT

4.3.5 Provide progress reports and outcomes of field test results.

ROLE/RESPON.	ARI	ORGANIZATION	
		TRADOC	SCHOOL
PRIME		TTFA REP	
SUPPORT	TTFA REP		TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ DOTD DOES TRAINING DEPT



DECISION POINT

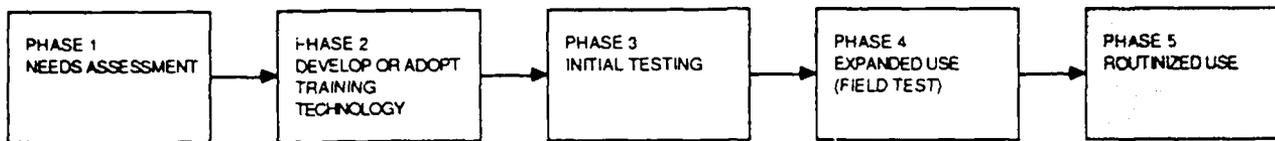
Have plans for Phase 5 activities been approved?

If YES, proceed with Phase 5.

If NO, assess objections and resubmit plans.

2.7 Phase 5 Guidelines

**PHASE 5  
ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)**



**OBJECTIVES:**

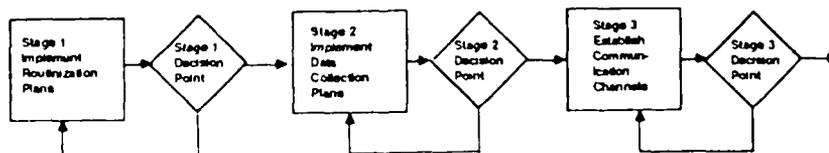
1. To establish routine use of the innovation by the target population in the intended environment,
2. To establish an information system to monitor and provide feedback from ongoing training,
3. To prepare lessons learned from the entire transfer process to guide the next transfer.

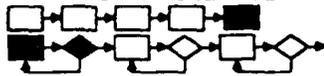
**PURPOSE:**

Within this phase, the training package is no longer an innovation, but becomes part of the established routine of the training organization. It then becomes part of the background of current practice whose needs are assessed for potential new rounds of innovation. Although specialized data collection can be phased out, we recommend that some data-based feedback concerning outcomes of the training be retained as a part of the normal training system. In addition, since systematic training technology transfer is still a fairly new activity, we recommend that a written report of the "lessons learned" during each attempted transfer be kept to provide a cumulative institutional memory of the problems and successes in this activity.

**STAGES:**

Stage 1 activities address the routinization of the innovation. Stage 2 activities address the implementation and assessment of data collection. Stage 3 activities address the effectiveness of the established communication channels and the "lessons learned" final report.





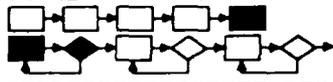
PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 1 IMPLEMENT ROUTINIZATION PLANS

ACTIVITY 1. Conduct training and and implement problem solving system for ongoing training.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TRAINING DEPT
SUPPORT	TTFA REP	TTFA REP	DOTD DOES TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	

The Training Dept. takes the responsibility for this activity with support from the DOTD, DOES. As part of the hand-off process the TTFA representatives provide support only during early portions of this activity. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



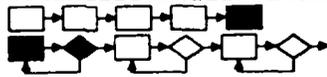
PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 1 IMPLEMENT ROUTINIZATION PLANS

ACTIVITY 2. Implement monitoring information system.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			TRAINING DEPT
SUPPORT	TTFA REP	TTFA REP	DOTD DOES TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	

The Training Dept. takes the responsibility for this activity with support from the DOTD, DOES. The TTFA representatives, again, provide support only during early portions of this activity. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



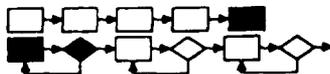
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 PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 1 IMPLEMENT ROUTINIZATION PLANS  
 =====

ACTIVITY 3. Integrate new training with routine procedures for supplies acquisition, facilities use, and equipment maintenance.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TRAINING DEPT
SUPPORT			DOTD DOES
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTFA REP	TTFA REP

The Training Dept. takes the responsibility for this activity with support from the DOTD, DOES. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



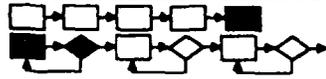
PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 1 IMPLEMENT ROUTINIZATION PLANS

ACTIVITY 4. Plan means for ongoing delivery, including orientation and training for new trainers and other staff.

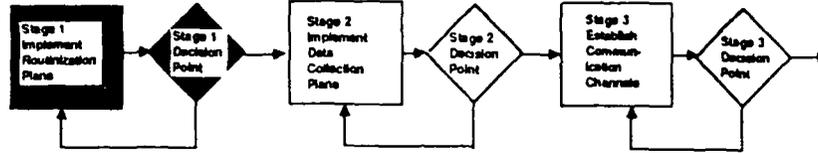
ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			DOTD
SUPPORT			TRAINING DEPT DOES
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTFA REP	TTFA REP

The DOTD takes the responsibility for this activity with support from the Training department and DOES. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 1 IMPLEMENT ROUTINIZATION PLANS



DECISION POINT

Is innovation being used routinely by the target population and in the intended environment?

If YES, proceed with stage 2 data collection and begin stage 3 activities.

If NO, discontinue use, reassess technology implementation and implementation support.





Summary: Phase 5, ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 Stage 1, IMPLEMENT ROUTINIZATION PLANS

5.1.1 Conduct training and implement problem solving system for ongoing training.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME		TRADOC	TRAINING DEPT
SUPPORT	TTFA REP	TTFA REP	DOTD DOES TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ

5.1.2 Implement monitoring information system.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME		TRADOC	TRAINING DEPT
SUPPORT	TTFA REP	TTFA REP	DOTD DOES TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ

5.1.3 Integrate new training with routine procedures for supplies acquisition, facilities use, and equipment maintenance.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME		TRADOC	TRAINING DEPT
SUPPORT			DOTD DOES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TTA TRADOC HQ TTFA REP	SCHOOL HQ TTFA REP

5.1.4 Plan means for ongoing delivery, including orientation and training for new trainers and other staff.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME		TRADOC	DOTD
SUPPORT			TRAINING DEPT DOES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TTA TRADOC HQ TTFA REP	SCHOOL HQ TTFA REP



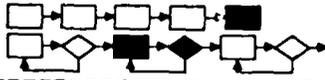
DECISION POINT

Is innovation being used routinely by the target population and in the intended environment?

If YES, proceed with stage 2 data collection and begin stage 3 activities.

If NO, discontinue use, reassess technology implementation and implementation support.





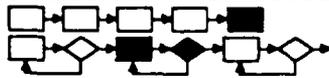
=====  
 PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 2 IMPLEMENT DATA COLLECTION PLANS  
 =====

ACTIVITY 3. Analyze and summarize ongoing data on learners outcomes.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			DOTD
SUPPORT			TRAINING DEPT DOES
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTFA REP	TTFA REP

The DOTD takes the responsibility for this activity with support from the Training department and DOES. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



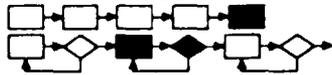
PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 2 IMPLEMENT DATA COLLECTION PLANS

ACTIVITY 4. Assess useful life of technology; monitor new technology developments for potential alternatives.

ROLES AND RESPONSIBILITIES

ROLE/RESPONSIBILITY	ORGANIZATION		
	ARI	TRADOC	SCHOOL
PRIME			DOTD
SUPPORT	TTFA REP	TTFA REP	TRAINING DEPT DOES TTFA REP
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ	TRADOC HQ	

The DOTD takes the prime responsibility for this activity with support from the Training department and DOES. Since there is a need to maintain cognizance of new technologies which may support this training application, the TTFA representatives also provide support for this activity. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



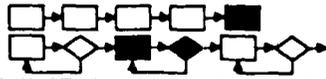
PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 2 IMPLEMENT DATA COLLECTION PLANS

ACTIVITY 5. Assess ongoing use of expendable supplies; track staff turnover.

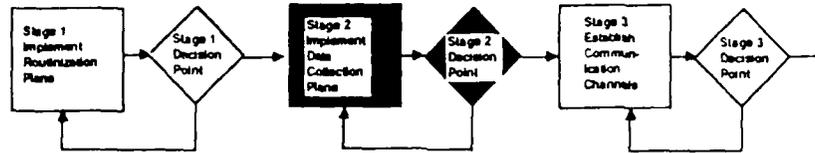
ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TRAINING DEPT
SUPPORT			DOTD DOES
REVIEW AND COORD.			SCHOOL HQ
INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	TTFA REP

The Training Department takes the responsibility for this activity with support from the DOTD and DOES. Coordination and review is the responsibility of the School Headquarters. The remaining organizations are to be briefed or provided reports.



PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 2 IMPLEMENT DATA COLLECTION PLANS



DECISION POINT

Is the innovation continuing to provide the expected learner outcomes at the anticipated level of resource expenditures?

If YES, continue with stages 1 and 2 and begin stage 3.

If NO, continue with Phase 5 activities but reinitiate Phase 1 activities for this area.



Summary: Phase 5, ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 Stage 2, IMPLEMENT DATA COLLECTION PLANS

5.2.1 Implement data collection system for routine monitoring.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME SUPPORT		TRADOC	DOTD TRAINING DEPT DCES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	SCHOOL HQ TTFA REP

5.2.2 Assign responsibility for data collection, analysis, and feedback.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME SUPPORT		TRADOC	SCHOOL HQ TRAINING DEPT DCES DOTD
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	SCHOOL HQ TTFA REP

5.2.3 Analyze and summarize ongoing data on learners outcomes.

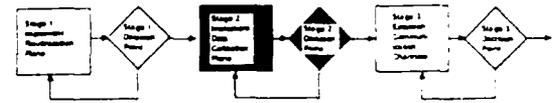
ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME SUPPORT		TRADOC	DOTD TRAINING DEPT DCES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TTA TRADOC HQ TTFA REP	SCHOOL HQ TTFA REP

5.2.4 Assess useful life of technology; monitor new technology developments for potential alternatives.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME SUPPORT	TTFA REP	TTFA REP	DOTD TRAINING DEPT DCES TTFA REP
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	SCHOOL HQ

5.2.5 Assess ongoing use of expendable supplies; track staff turnover.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME SUPPORT		TRADOC	TRAINING DEPT DOTD DCES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTA TTFA REP	SCHOOL HQ TTFA REP



DECISION POINT

Is the innovation continuing to provide the expected learner outcomes at the anticipated level of resource expenditures?

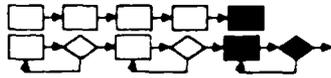
If YES, continue with stages 1 and 2 and begin stage 3.

If NO, continue with Phase 5 activities but reinitiate Phase 1 activities for this area.









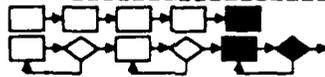
PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 3 ESTABLISH COMMUNICATION CHANNELS

ACTIVITY 4. Assess possible change in support of innovation with a change in Command personnel and under altered priorities.

ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TTFA REP
SUPPORT			TRAINING DEPT DOTD DOES
REVIEW AND COORD.		TTA	SCHOOL HQ
INFORMATION	ARI HQ TTFA REP	TRADOC HQ TTFA REP	

The prime responsibility for this activity is held by School TTFA representative with support from the major directorates (DOTD, DOES, and the Training Department. Coordination and review is the responsibility of the School Headquarters with additional review by the TTA. The remaining organizations are to be briefed or provided reports.



PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 3 ESTABLISH COMMUNICATION CHANNELS

ACTIVITY 5. Prepare a final report of "lessons learned".

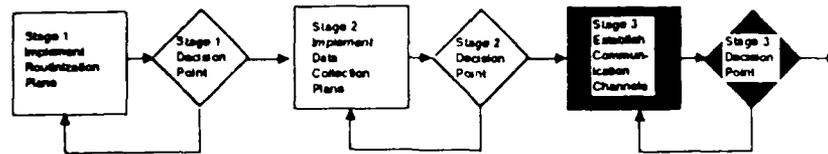
ROLES AND RESPONSIBILITIES

<u>ROLE/RESPONSIBILITY</u>	<u>ORGANIZATION</u>		
	<u>ARI</u>	<u>TRADOC</u>	<u>SCHOOL</u>
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	DOTD TRAINING DEPT DOES
REVIEW AND COORD.	ARI HQ	TTA TRADOC HQ	SCHOOL HQ

The TTFA has the prime responsibility for this activity with the School TTFA representative taking the lead and the ARI and TRADOC representatives supporting. Support is also provided by the major directorates (DOTD, DOES, and the Training Department). Review and coordination is the responsibility of the School Headquarters with additional reviews by the TTA, TRADOC Headquarters, and ARI headquarters.



PHASE 5 ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 STAGE 3 ESTABLISH COMMUNICATION CHANNELS



### DECISION POINT

Are communication channels providing information to and receiving information from all interested parties?

If YES, Technology transfer appears to be complete and routinized.

If NO, analyze shortcomings and make changes to communication procedures.



Summary: Phase 5, ROUTINIZED USE (NEW TECHNOLOGY NO LONGER INNOVATION)  
 Stage 3, ESTABLISH COMMUNICATION CHANNELS

5.3.1 Arrange communication channels to ensure open access to all interested parties.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME		TRADOC	SCHOOL HQ
SUPPORT	TTFA REP	TTFA REP	DOTD DCES TRAINING DEPT SCHOOL HQ
REVIEW AND COORD. INFORMATION	ARI HQ	TTA TRADOC HQ	TTFA REP

5.3.2 Provide data from monitoring system to communication channels.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME			DOTD
SUPPORT			TRAINING DEPT DCES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TTA TRADOC HQ TTFA REP	SCHOOL HQ TTFA REP

5.3.3 Assess communication channels for information flow in both directions.

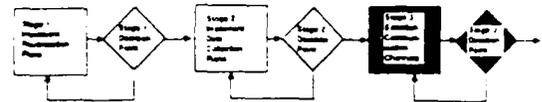
ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME			DOTD
SUPPORT			TRAINING DEPT DCES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TTA TRADOC HQ TTFA REP	SCHOOL HQ TTFA REP

5.3.4 Assess possible change in support of innovation with a change in Command personnel and under altered priorities.

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME			TTFA REP
SUPPORT			TRAINING DEPT DOTD DCES
REVIEW AND COORD. INFORMATION	ARI HQ TTFA REP	TTA TRADOC HQ TTFA REP	SCHOOL HQ

5.3.5 Prepare a final report of "lessons learned".

ROLE/RESPON.	ARI	ORGANIZATION	SCHOOL
PRIME			TTFA REP
SUPPORT	TTFA REP	TTFA REP	DOTD TRAINING DEPT DCES
REVIEW AND COORD.	ARI HQ	TTA TRADOC HQ	SCHOOL HQ



DECISION POINT

Are communication channels providing information to and receiving information from all interested parties?

If YES, Technology transfer appears to be complete and routinized.

If NO, analyze shortcomings and make changes to communication procedures.

## REFERENCES

- Allen Corporation of America. (1985). Proceedings of Technology Transfer Workshop. Alexandria, VA: Author.
- Scheirer, M. A., & Hart, F. L. (in press). Conceptual Model for the Training Technology Field Activity (Research Note). Alexandria, VA: U.S. Army Research Institute.