# **What is this resource?**

The SC CTSI developed, successfully implemented, and provides this template as a guide to be used for conducting internal intakes (informational interviews) about educational offerings at a CTSA with the goal of producing an inventory and assessment of all educational offerings. Findings can be used to inform recommendations that would enhance the impact of a CTSA’s educational offerings likely through standardizing quality, development, tracking, and evaluation of education offerings.

After using this resource, you will be able to

* Describe what a CTSA core does as relevant to the Education Resource Center\*
* Determine whether an educational offering achieves alignment (stated learning objectives are both taught and assessed)
* Identify how educational offerings are evaluated, both product and process
* Provide rationale for intervention or assistance from the Education Resource Center
* Describe how educational offering content is produced and disseminated
* Identify additional information important to the core as relevant to educational offerings

\*See Terminology section below

# **How do I use it?**

Follow the steps below to complete an inventory and assessment of your CTSA’s educational offerings.

1. Review this resource which serves as the intake template and contains the questions you will ask. If you prefer, this resource is also available in slide deck format.
2. Edit questions as necessary, adding/deleting and changing terminology according to need. While the questions are in a suggested order, change the order if desired.
3. Prepare a Google Doc, Excel file, or your preferred software as the place to store the information you collect during intakes. Information can also be entered directly on this resource.
4. Schedule meetings to perform intakes with each CTSA core’s main stakeholder who knows the most about its educational offerings. Provide the purpose and questions to them in advance in the form of a meeting agenda based off this resource. Each intake is expected to take an hour.
5. During the meeting, ask the questions you finalized on this resource and record the information.
6. Analyze the collected information. Show your data to each stakeholder interviewed so they have the opportunity to make any needed corrections.
7. Present the findings and your analysis to CTSA directors and core directors. Consider using this resource or the accompanying slide deck resource to present the process and questions.

# **Terminology**

Terms used in this resource may be unique to the SC CTSI but will have their equivalents at most other CTSAs. The meaning of the terms used in this resource are described below.

* **Educational Offering:** Any event a CTSA provides that is intended as a teaching and learning opportunity, including those in a series or hosted only once, occurring in-person, online, or in a hybrid format, synchronous or asynchronous, open to any audience, complimentary or fee-based, for-credit or non-credit.
* **Core:** A sector, group, department, or unit with a specific aim or function that works with other sectors, groups, departments, or units to together make up a CTSA as a whole.
* **Education Resource Center:** The centralized body at a CTSA responsible for oversight or organization of learning initiatives and/or supporting overall education program development, administration, and evaluation.
* **Learning Objective:** A statement that finishes the sentence “By the end of this educational offering, participants will be able to…” and is based on instructional design principles for ensuring specific and measurable outcomes.

# **Question to Ask**

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| **How many educational offerings does the core provide annually?**Ask for and record the following information |
| Name of the offering |  |
| Target audience |  |
| Number of typical attendees  |  |
| Learning objectives (By the end of this offering, participants are able to…) |  |
| Format (course, webinar, workshop, recording, etc.) |  |

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| **How do you define/measure success for an educational offering?**Ask for and record the following information |
| How do you know participants can demonstrate the skills specified in the learning objectives by the end of their participation in the offering?  |  |
| Is success also based on number of attendees or number of clicks? |  |

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| **How do you evaluate educational offerings?** Ask for and record the following information |
| For example, which levels of [Kirkpatrick](https://www.kirkpatrickpartners.com/Our-Philosophy/The-Kirkpatrick-Model) are reached?Reaction (feelings, liked/disliked, self-reported; often a feedback survey “smile sheet”) |  |
| Learning (demonstrated ability to perform a skill; usually requires assessing participants) |  |
| Behavior (application of learning while on the job; usually requires observation of participants) |  |
| Results (lasting positive impact on desired results such as grant goals; usually requires longer-term follow up “where are they now”) |  |

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| **What need did you identify that could be addressed by the Education Resource Center?**Ask for and record the following information |
| How did you become aware of this need? |  |
| By when must this need be addressed (project completion date)? |  |

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| **What is your process for producing educational offering content?**Ask for and record the following information |
| Do you curate (use existing) or create (make your own new) content? |  |
| How many people are typically involved as content matter experts? Which one is usually the final decision maker? |  |
| What is the shelf life of the content (changed annually or every few years)? |  |
| Which tools or platforms are needed to deliver the content (Blackboard, Zoom, website, etc.)? |  |

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| **What else should the Education Resource Center know?**Ask for and record the following information |
| For example, do you also need to produce an accompanying resource such as a toolkit? |  |
| What percent focus would you say are educational offerings for your core? |  |

# **Questions & Feedback?**

This resource is intended to be collaborative & help start a conversation amongst CTSAs about our educational offerings. Providing feedback will enhance future iterations of this resource.

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