| Expert Judgment Phase | | |
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| **Congruence Analysis** | **Organizational Needs** | To conduct the organizational needs portion of the congruence analysis, I would first look at the instructional goals designed in Component 1 of the instructional design process. After I had developed an understanding of what the goals of the instructional program were, I would consult the district's strategic plan or vision documents to determine what the organization's goals are. In my context, these documents are readily available, as are a number of individuals with close ties to the design of those documents who may be able to provide more information. I would compare my findings from each source to determine if the goals of the instructional program reasonably support the general goals of the school district. I would also need to develop an understanding of who the learners are and what they are expected to do in their jobs, including how they would be expected to incorporate the skills they obtained from this instructional program. This information should be gathered from both Component 3 and the performance context and again evaluated for their congruence. |
| | **Resources** | Determining whether the organization's committed resources are sufficient for effective implementation of the instructional program is the next step in the congruence analysis. Component 6 and Component 7 should be consulted to evaluate the stated needs of the instruction and their likelihood to support the learning that is expected of the instruction. Information about the anticipated performance and learning contexts from Component 3 will also be cross-referenced with data gathered from managerial interviews about the resources that decision-makers were actually willing to commit to the instruction once it was implemented. |
| **Content Analysis** | | To analyze the content of this instructional program, I would want to evaluate the instructional materials using the other design documents, particularly those from Component 2, Component 4, and Component 5. For this instructional program, I feel that I have enough content expertise to be able to adequately perform this analysis myself, but I would also consider engaging other professional development and instructional technology experts in evaluating the instructional materials. My goal for the content analysis is to evaluate whether the materials are sufficient to meet the stated objectives of the instruction, and specifically whether the content of the materials is accurately mapped to real skills in the instructional analysis and real behaviors in the performance objectives. |
| **Design Analysis** | | In the design analysis, the instructional strategy of Component 6 is the main focus for evaluation. To accomplish this, I would use the evaluation rubric provided in Chapter 8 of our course text. This tool provides a framework for asking key questions about each of the components of an instructional strategy. By the end of this point in the summative evaluation, it should become clearer whether it would be worthwhile to conduct an impact analysis for the program. |

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| **Transfer Possibility Analysis** | The final piece of the expert judgment phase of the summative evaluation is a critical one, because instruction that does not succeed in transferring skills from the learning context to the performance context wastes the organization's resources. The performance context will again be evaluated during this analysis as I learn how the performance context will be able to support the continued display of expected behaviors in Component 4. With this information in hand, I would then turn back to the instructional design documents to ascertain (1) whether the instructional designer accurately accounted for the supports that I identified, and (2) whether the instructional strategy and materials adequately prepared the learners to take advantage of these supports. |

| **Implementation of Summative Evaluation** |
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| Implementing the summative evaluation would be a collaborative exercise with school administrators, classroom teachers, and potentially other professional development and educational technology experts. I would consult with administrators to learn about their expectations for teacher performance as it relates to the SMART Board and its accompanying software solutions, their strategic vision and goals for their school, and the resources that they have committed to the implementation of the instructional program. I would work directly with classroom teachers (i.e., the learners in this program) to obtain their attitudes about the instructional program. I would also observe these learners in two settings: their lesson planning and their classroom teaching. Being able to use the Lumio software platform to create and develop lessons is a skill that is expected of learners who complete this instruction, and this skill is most often performed during a teacher's lesson planning time. The majority of the goals, however, relate to instructional activities performed live with students in a classroom and include the use of the SMART Board to facilitate various learning activities. In order to fully evaluate the impact of the instructional program, observations in each setting would be required. Finally, I may consider partnering with other teacher professional developers or educational technology experts who could assess learning materials for their content and congruence with the instructional strategy, goal and task analyses, and performance objectives. I would keep notes and compile a comprehensive, evidence-based report to share with all stakeholders at the conclusion of the summative evaluation. |

| **Determining Success or Failure** |
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| When conducting my summative evaluation, I would determine whether the instructional program was a success or failure based on data I collect from the performance context after the instruction has been completed and learners have had ample opportunities to practice incorporating their new skills into their daily work. This data would be both quantitative and qualitative in nature, combining posttest and other assessment results with attitude questionnaires, interviews, and annotated observations. If the summative evaluation reveals that all components of the instructional design process are internally consistent, then I would know that (1) the instruction was necessary to meet an organizational need, (2) successful completion of the program would result in the need being met, (3) learners require the instruction because they do not currently have the skills, and (4) the instructional strategy and learning materials provide adequate opportunities for learners to obtain and perform new skills. It would follow that successfully performing the behaviors of each performance objective (under the stated conditions and according to the criteria) indicate achievement of the instructional goals and thus the success of the instructional program. Failure of the instructional program would be evidenced by inconsistent design documents, poor resource allocation, or misalignment of instruction with learner characteristics. |