

Training Works!





Population Leadership Program



For 30 years, JHPIEGO has been committed to improving the health of women and families throughout the world. JHPIEGO is dedicated to excellence—ensuring quality service delivery and strengthening human capacity development. The organization’s work spans a continuum of client-centered care—from prevention to treatment—in reproductive health and family planning, HIV/AIDS, maternal and neonatal health, and cervical cancer. As an affiliate of Johns Hopkins University, JHPIEGO draws on the University’s extensive expertise to develop innovative responses to the challenges of today’s reproductive health needs.

JHPIEGO

Brown’s Wharf

1615 Thames Street

Baltimore, Maryland 21231-3492, USA

This publication was made possible through support provided by the Service Delivery Improvement Division, Office of Population and Reproductive Health, Bureau for Global Health, U.S. Agency for International Development, under the terms of Award No. HRN-A-00-98-00041-00. The opinions expressed herein are those of JHPIEGO and do not necessarily reflect those of the U.S. Agency for International Development.

November 2003

Acknowledgments

Project Coordinator:

Rick Sullivan, Director of Learning and Performance Support,
JHPIEGO (rsullivan@jhpiego.net)

Core Development Team:

Hunter Alfriend, Staff Development Specialist, JHPIEGO

Carolyn Curtis, Public Health Specialist/Nurse Midwife, USAID

James L. Griffin, RH Advisor for Performance Improvement and
Training, Service Delivery Improvement Division, Office of Population
and Reproductive Health, Bureau for Global Health, USAID

Wallace Hannum, Director of Performance Systems, PRIME II/
IntraHealth International, Inc.

Debra Kosko, Senior Technical Advisor, Population Leadership
Fellow, Bureau for Global Health, USAID

Jim McCaffery, Senior Consultant, PRIME II/Training Resources
Group, Inc. (TRG)

Catherine Murphy, Senior Instructional Designer, PRIME II/
IntraHealth International, Inc.

Gail Rae, Manager, Professional Development, Population Leadership
Program/Public Health Institute

Robert Rice, Director, Field Programs, Family Health International (FHI)

Sharon Rudy, Project Director, Population Leadership Program/
Public Health Institute

Lois Schaefer, Senior Training Advisor, JHPIEGO

Jane Schueller, Associate Director, Field Programs, Family Health
International (FHI)

Karin Kanewske Turner, Professional Development and Training
Advisor, Bureau for Global Health, USAID

Editor:

Ann Blouse, JHPIEGO

Graphic Designer:

Youngae Kim, JHPIEGO

Table of Contents

Acknowledgments	iii
Training Works!	1
How to use this handbook	
Performance needs assessment	
Managing Training	9
Confirm that a performance needs assessment (PNA) has been conducted and that training will close the performance gap	
Plan, acquire, and manage resources to achieve training outcomes	
Select the training design team	
Establish a monitoring and evaluation strategy	
Manage training logistics	
Communicate with learners and their supervisors before training	
Provide followup support for learners and supervisors after training	
Designing Training	17
Verify the performance gap and goal of training	
Gather background information about the learners and identify the knowledge, skills, and attitudes they need to acquire	
Identify content resources	
Write learning objectives	
Develop the training plan	
Develop or adapt training materials	
Develop or adapt evaluation instruments	
Delivering Training	25
Establish and maintain credibility	
Conduct training in a responsive and collaborative way	
Create a learning environment where participants feel comfortable and safe	
Provide supportive feedback	
Use effective communication and presentation skills	
Use effective facilitation skills	
Provide opportunities for practical application of knowledge and skills	
Monitor the process of training and make adjustments, as needed	

Evaluating Training 33
Determine learners' satisfaction with training
Determine whether learners have met the learning objectives by giving and scoring knowledge evaluations
Determine whether learners have met the learning objectives by giving and scoring skill evaluations
Improve training using information from the knowledge and skill evaluations
Monitor and evaluate performance on the job
Determine the effectiveness of training as an intervention to improve performance

Other Ways to Use This Information 41



Training Works!

What makes one training experience better than another? Effective training can help providers of family planning/reproductive health (FP/RH) services to improve their performance. This handbook summarizes the tasks that should be completed at each stage of training to ensure an effective training course. If you carry out these tasks, you will have a high-quality training course. Think of these tasks as standards to be achieved or guidelines to be followed.

This handbook will be useful to anyone who has a role in the management, design, delivery, or evaluation of group-based training for healthcare professionals who are currently providing services such as inservice training. You may be a project manager, an instructional designer, a clinical trainer, an evaluation specialist, or a trainer who “does it all.” Or, you simply may be interested in knowing more about training to help you make program decisions or participate in stakeholder meetings. There is something in this handbook for each of you. Also, you will recognize that many of

these standards apply to other types of training, such as on-the-job training, distance learning courses, and computer-assisted learning.

How to use this handbook

There are many ways you can use *Training Works!* In general, take your time learning about how to make training effective. Reading the entire handbook all at once may not be the best way to use the information. Here are a few suggestions:

- Read about why conducting a performance needs assessment is an important first step.
- Look at the tasks within the four stages of training.
- Determine where you want to start. What is your role in the training process? If you are a training manager, you may simply want to read that section first. Where are you in the training process? Is one stage more important to you at this point than the others? Is there a specific task within a stage that you need to know about right now? Once you have determined where you are in the training process, you may want to go directly to that stage and read those guidelines. Do not feel that you have to read the sections in sequence.
- Aim for early success. Trying to implement all of the guidelines in this handbook at one time will lead to chaos and confusion. Start with one or two tasks that will make your training more effective. Once those are addressed, move on to others.
- Be sure to read the “Other Ways to Use This Information” section of the handbook. You will find a lot of practical ideas there.



Performance needs assessment

There are many factors that affect the performance of healthcare workers. It is often hard to know why healthcare workers are not providing high-quality services. A **performance needs assessment** (PNA) will identify performance gaps or problems and give you the information you need to determine what can be done to improve job performance. A PNA is part of a process called performance improvement that is used to solve performance problems by involving healthcare providers, their facilities, clients, and the community in improving services.

The purpose of a PNA is to identify performance gaps or problems and determine the most appropriate interventions to improve worker performance.

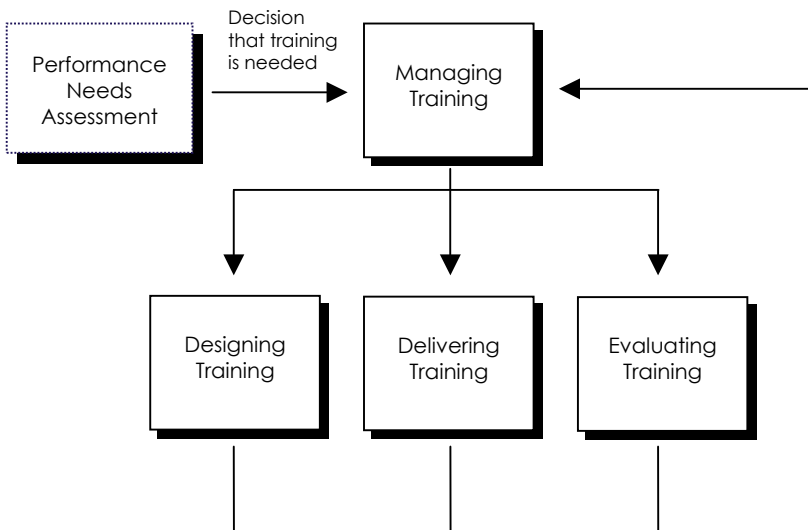
These are the steps in conducting a PNA:

- Define desired performance. Ask, “What is the healthcare provider expected to do?” “How well is the provider expected to perform?” “Under what conditions?” “With what frequency?”
- Describe actual performance. Focus on the performance of an individual or a group. The difference between the desired performance and the actual performance is called the *performance gap*.
- Conduct a *root cause analysis* to find out why there is a performance gap. Gather information from as many people as possible who come in contact with the healthcare service (e.g., providers, supervisors, clients, community members).
- Select the appropriate intervention(s) to improve performance. If the cause of poor performance is deficient knowledge or skills, training is the appropriate intervention.



The information collected in the PNA will be useful for all stages of training (see figure below). The *training manager* can use the information to guide the design, delivery, and evaluation of training. The *training designer* needs to know what knowledge and skills are required to improve performance on the job. The *trainer* will use the information to help learners achieve the course objectives. The *training evaluator* must understand the work environment to determine whether training has closed the performance gap.

Stages of Training



Within each stage, there are essential tasks to be completed (see **pages 6 and 7**) to progress through that stage. We give you information about why these tasks are important and how to ensure that they are being carried out. We do not tell you how to do these tasks—such information is beyond the scope of this handbook. Within each stage, there are “tips” to help put the tasks into action. Finally, at the end of the handbook we offer other ways the information can be used.



Managing Training

- Confirm that the performance needs assessment has been conducted and that training will close the performance gap
- Plan, acquire, and manage resources to achieve training outcomes
- Select the training design team
- Establish a monitoring and evaluation strategy
- Manage training logistics
- Communicate with learners and their supervisors before training
- Provide followup support for learners and supervisors after training

Designing Training

- Verify the performance gap and goal of training
- Gather background information about the learners and identify the knowledge, skills, and attitudes they need to acquire
- Identify content resources
- Write the learning objectives
- Develop the training plan
- Develop or adapt training materials
- Develop or adapt evaluation instruments



Delivering Training

- Establish and maintain credibility
- Conduct training in a responsive and collaborative way
- Create a learning environment where participants feel comfortable and safe
- Provide supportive feedback
- Use effective communication and presentation skills
- Use effective facilitation skills
- Provide motivational incentives and positive reinforcement
- Provide opportunities for practical application of knowledge and skills
- Monitor the process of training and make adjustments, as needed

Evaluating Training

- Determine learners' satisfaction with training
- Determine whether learners have met the learning objectives by giving and scoring knowledge evaluations
- Determine whether learners have met the learning objectives by giving and scoring skill evaluations
- Improve training using information from the knowledge and skill evaluations
- Monitor and evaluate performance on the job
- Determine the effectiveness of training as an intervention to improve performance



8

My Notes:





Managing Training

Confirm that a performance needs assessment (PNA) has been conducted and that training will close the performance gap

As described in the previous section, a PNA should be done before training is undertaken. The PNA defines the content of the training and provides information that will be used to design, deliver, and evaluate training. To effectively manage all stages of

Tips for Managing Training

- Develop a team and assign each member a specific responsibility for managing training courses (e.g., funding, budgets, logistics, communications)
- Establish methods for communicating with trainers, learners attending courses, and their supervisors before, during, and after training
- Ensure that training budgets include funds for supporting the learner on the job after training through followup visits, communications with supervisors, and the like
- Ensure that the monitoring and evaluation strategy will provide information on whether training resulted in improved job performance

training, the manager must be thoroughly familiar with the PNA findings and recommendations.



In your training manager role, you should:

- Review information from the PNA that describes the performance gap, and confirm that the root cause is a lack of knowledge and/or skills
- Make sure that workers know what they are expected to do (have clear job expectations) or will learn about any new job expectations before participating in training
- Assess whether job expectations are realistic, given the current working environment
- Determine whether tasks that are currently performed by the worker are essential to the worker's job as defined by an existing standard
- Check that appropriate motivation and incentives for the learner are in place and that barriers to performance have been identified
- Determine whether interventions other than training are needed to improve job performance, and that the need for these interventions is taken into account to help ensure application of learning on the job

Plan, acquire, and manage resources to achieve training outcomes

After confirming that training is needed, the first priority is to develop a budget for all of the training costs—design, delivery, and evaluation. The budget may include costs for people's time, facilities, travel, learners' expenses, learning materials (including audiovisuals), equipment, and supplies. (See sections on Design, Delivery, and Evaluation for more information on essential elements of training that will be cost factors to consider.)



The next step is to secure funding. Sometimes the amount of money available for training will have been established first. In these cases, the budget (and therefore the training design) must be within the funding amount.

In your training manager role, you should:



- Develop a budget that includes categories covering the necessary training activities
- Obtain funds to support the budget
- Ensure that processes are in place for proper management of the budget and disbursement of the funds

Select the training design team

A good training design is necessary for a successful training course. The job of the designer or design team is to develop the plan and materials for the training course. To develop them, the team needs to know that all performance factors have been examined and that training is the appropriate intervention. They also need information on the performance gap and the specific knowledge and skills needed to close it. Finally, they must know the amount of funding available for the training course itself.

One person or a team may be responsible for the design of training. Ideally, the design team is made up of a trainer, training manager, instructional designer, supervisor, technical content expert, training evaluator, and/or others (e.g., someone with the perspective of the learner). When possible, some members of the training design team should be members of the training delivery team. If this is not possible, the person(s) who will deliver the training must be thoroughly familiar with the training design before the course begins.





In your training manager role, you should:

- Select a training design team (or instructional designer) that:
 - Includes a subject matter expert who is proficient in the knowledge and skills to be learned
 - Knows how to design and use different types of training strategies, activities, and media
 - Uses a systematic instructional design approach for the design, delivery, and evaluation of training
 - Is sensitive to the ways that issues concerning ethnic groups, gender, and organizational culture may affect training design in a specific location
 - Uses up-to-date, realistic knowledge of the learners' current or eventual work settings
 - Incorporates ways for learners to receive timely assessment and feedback
- Have the authority to make decisions about the training design

Establish a monitoring and evaluation strategy

The purpose of training is to give workers the knowledge and skills they need to perform on the job. Effective training can have an immediate impact on both provider and facility performance. Therefore, it is important to have a way to continually compare actual to desired performance, as well as determine any change in performance. In addition to showing how training affects individual and facility performance, this information will help identify changes needed in training design or delivery.



In your training manager role, you should:

- Define minimum job performance standards that are consistent with the desired performance described in the PNA



- Ensure that the evaluator or evaluation team is able to:
 - Develop tools (e.g., course evaluation questionnaire) and processes (e.g., interviews) to assess learners' achievement of learning objectives and satisfaction with training
 - Develop tools (e.g., skills checklist) and a process (e.g., followup after training) to monitor and evaluate performance on the job after training
 - Develop tools (e.g., an action plan to be completed by the learner) and a process (e.g., supervisor involvement) to address any barriers or problems in applying newly learned knowledge, skills, and attitudes on the job, as identified during the monitoring process

Manage training logistics

The success of a training course often depends on how effectively the details of the course arrangements are managed. Training logistics include (but are not limited to) activities such as:

- Sending the course syllabus and learning objectives to learners and their supervisors before training
- Arranging for and visiting training facilities before training, including meeting with clinical trainers and staff at the clinical training site
- Making arrangements for housing, meals, and local transportation
- Ordering training materials and audiovisuals
- Managing financial arrangements, including learners' per diems, facility fees, and the like
- Communicating and planning with the training delivery team



There may be several people from different organizations responsible for managing different aspects of the training logistics. It is essential that everyone involved in managing logistics communicate with one another on a regular basis.



In your training manager role, you should:

- Develop a list of all of the logistics for the training course
- Assign responsibility for each of the training logistics and ensure that those responsible are aware of your expectations
- Establish and follow a reasonable timeline of activities to guide management of training logistics

Communicate with learners and their supervisors before training

One of the training manager's responsibilities is to ensure that as much information as possible about the work situation and performance needs of the learners is obtained and shared with the design, training, and evaluation teams. Ideally, before the course is designed, the manager or design team should visit the learners' work sites to get this information. If visits are not possible, the manager or design team may gather information through telephone calls, questionnaires, and review of supervision reports.

Gathering information about the work situation and performance of learners before the delivery of the course allows the trainer to build on the knowledge and skills that learners bring to the course. It also allows the trainer to address during training delivery specific challenges faced by the learners in their work sites. The evaluator can use this same information as a baseline to determine whether



training has had an impact on performance back at the job after training.

The manager must ensure that the learners and their supervisors receive information about the course (e.g., course syllabus, learning objectives, precourse learning activities) before the course begins. Sharing this information helps increase the supervisor's commitment and support for implementing new knowledge and skills after training.

In your training manager role, you should:



- Gather information from potential learners and their supervisors as part of the course design process
- Conduct any additional needs assessments and site visits before training to validate and supplement the results of the PNA
- Share information about the course with learners and their supervisors before the course begins

Provide followup support for learners and supervisors after training

Followup after training is an important, but often overlooked, aspect of training. Visits to the job site by the training manager or trainer will help determine whether new knowledge and skills have become part of the learner's practice. Visits can also help identify why a learner may be having trouble applying new knowledge and skills. Followup visit activities may include observing, coaching, solving problems, gathering data about the learner's progress, and identifying other performance gaps. If site visits are not possible, consider followup by telephone or correspondence. Followup support is most effective when supervisors actively participate in the followup activity. Both the learner and the



supervisor should be informed of the findings and recommendations resulting from the followup visit.



In your training manager role, you should:

- Make sure that training followup activities (e.g., visits, phone calls, correspondence) take place soon after training and that the followup:
 - Supports learners' performance on the job (e.g., using performance checklists, modeling new skills, coaching and providing feedback, monitoring and supporting learners' action plans, identifying other performance support issues)
 - Strengthens supervisors' skills in supporting learners' performance on the job
 - Reviews learning action plans with supervisors and learners, making sure the activities are described in specific detail and are consistent with the needs of the work setting
 - Shares observations with supervisors and learners in an objective and constructive manner
- Continue to communicate with supervisors and learners after training to monitor job performance and support learners' needs





Designing Training

Verify the performance gap and goal of training

The first step in designing a training course is to verify that training really is required to improve worker performance. Information from the PNA, as well as any additional information obtained by the manager or trainer (see **Managing Training, page 9**) concerning the performance gap, the knowledge, skills, and attitudes needed to close the gap, the

Tips for Designing Training

- Work with those conducting the PNA to develop a clear understanding of the performance situation, the workers who will be attending training, and the working environment
- Collect and analyze existing training materials related to the performance situation
- Identify the guidelines for designing training that apply to the current situation
- Develop a list of the specific design and development steps and products (e.g., objectives, plan, syllabus, tests) along with approximate completion dates
- Use the guidelines to assess the overall quality of the training design

learner, and the job site will be shared with the design team.

Ask, “What do learners need to know and be able to do to perform essential tasks on the job?” Answering this question will produce a list of the specific knowledge, skills, and attitudes (KSAs) that will form the basis of the learning objectives and shape the content of the training course.



In your training designer role, you should:

- Use the results of the PNA for reference during the design process
- Describe the performance gap that the training will address
- Clearly state the goal of the training course (i.e., describe, in broad terms, what the learner will be able to do after training)
- Link the goal of the training to the performance gap

Gather background information about the learners and identify the knowledge, skills, and attitudes they need to acquire

Learn as much as possible about the type of healthcare worker for whom the course will be designed and the typical work setting for this type of worker (e.g., national-level supervisors at the ministry of health; family planning counselors at level 1 health posts).



In your training designer role, you should:

- Gather information about learners, including:
 - Current level of knowledge, skills, and performance



- Educational background, including reading and writing level and language(s) spoken
- Job category and job description
- Current or future location and type of facility where they work
- Motivation/incentives for participating in training
- Work relationships with supervisor and co-workers
- Other characteristics that may be relevant to the knowledge and skills to be acquired and training methods to be selected (e.g., age, sex, culture, attitudes, local work practices)
- Gather information about:
 - Existing national policies and service delivery guidelines
 - Existing supervision system
 - Types of healthcare services offered at the work site
 - Size and condition of the work site (e.g., number and type of rooms, privacy, access to clean, running water, supplies and equipment, and the like) when the learners are facility-based
- Identify essential job tasks that the learners will be expected to perform on the job
- Identify knowledge, skills, and attitudes required of learners

Identify content resources

The training course is based on the KSAs required of the learner on the job after training. For many courses, appropriate content resources (e.g., reference manuals, books, videos, learning exercises, anatomic models) may be available for use or adaptation. Identifying, reviewing, and adapting (if appropriate) existing content resources will help focus the content of the course and often reduces time and costs associated with design and development.





In your training designer role, you should:

- Identify and review relevant content resources
- Use existing content resources in the design of the training course

Write learning objectives

Learning objectives describe the specific KSAs the learner will know or be able to do after the training (i.e., they reflect the performance need). By meeting the course objectives, the learner will achieve the course goal. Thus, the objectives should connect the performance need to the training.

Learning objectives should be clear and measurable, and provide direction for the design, delivery, and evaluation of the course (i.e., the objectives may be knowledge-based, skill-based, or both). The objectives tell the learners what they will learn and how their knowledge and skill acquisition will be evaluated. The objective should clearly state what the learners are expected to know or do (the performance) and how well they must demonstrate mastery of the objective (the criteria). For example, “After completing this course, the learner will be able to counsel family planning clients according to the counseling checklist.”



In your training designer role, you should:

- Write learning objectives using a standard format
- Develop learning objectives based on essential KSAs required to perform job tasks
- Use learning objectives as the basis for the training plan
- Ensure that learning objectives appear in the course materials for the trainer and learners



Develop the training plan

A well-developed training plan is the foundation for a successful training course. The three most common components of a training plan are the course syllabus, schedule, and outline or “map.”

The **course syllabus** contains basic information about the course (e.g., description, goal, learning objectives, learner selection criteria, evaluation criteria, suggestions for supporting the learner before, during, and after training).

The **course schedule** indicates the number of training days and is a day-by-day description of the general course activities (e.g., presentations, exercises, clinical practice, knowledge and skill evaluations).

The **course outline** or map describes how the trainer should conduct each session on the course schedule (including activities and exercises to support the learner during and after training). If the same course is to be given at different sites and/or by different trainers, the course outline will help ensure that the training is delivered in a standard way each time.

In your training designer role, you should:



- Develop a training plan that is within the budget established for the training and includes components such as a course syllabus, schedule, and outline. Consider the learning objectives and ask:
 - How many days will the course require?
 - How many learners will attend the course?
 - Will the course have both classroom and clinical components?
 - What learning methods are appropriate for the course (e.g., interactive presentations,



case studies, role plays, simulations with anatomic models, problem-solving exercises, computer exercises, guided clinical practice with clients)?

- Should knowledge and skill evaluations be administered?

Develop or adapt training materials

The training materials, or training package, should include all of the materials required by the trainer and learner to implement the training plan. A subject matter expert will be needed if new materials must be developed or existing materials adapted. Sometimes it is possible to find existing materials designed to meet the same performance need. In this case, it will not be necessary to develop new or adapt existing materials. Before delivery of the first training course, the materials should be developed or adapted and then tested. Training materials typically include:

- A reference manual, containing content essential to the KSAs being taught—this manual is the basis for the delivery of the course, as well as a resource the learners will use on the job
- Supporting reference materials (e.g., national or international standards or guidelines)
- Audiovisuals (e.g., transparencies, computer presentations) drawn from content in the reference manual
- A learner's guide, which includes the course syllabus, schedule, exercises, case studies, role plays, skill development checklists, and an action plan form (to help the learner apply newly learned KSAs on the job)
- A trainer's guide, which includes the same information as in the learner's guide, as well as the course outline, answers to exercises, knowledge and skill assessments, and



suggestions for helping the learner apply newly learned KSAs at the job site

In your training designer role, you should:



- Develop or adapt reference materials (if you are not proficient in the KSAs that are the basis of the course, you must identify a subject matter expert to develop or adapt the reference materials)
- Develop audiovisuals
- Develop a learner's guide
- Develop a trainer's guide

Develop or adapt evaluation instruments

Evaluation of KSAs learned during a training course determines if learners have met the learning objectives and helps the trainer know whether training met its learning goal. Examples of ways to evaluate learners' knowledge are multiple-choice tests, oral interviews, essay tests, and written reports. Knowledge evaluations administered before and after the course are referred to as pre- and post-tests. Examples of skill evaluation approaches include using checklists for direct observation of performance during simulations (e.g., counseling role plays, procedures with anatomic models) and during procedures with clients. Attitudes are assessed during skill evaluation.

KSA evaluation instruments must be **valid**. To be valid, an instrument must be based on the learning objectives (i.e., it must measure what it says it is going to measure). Evaluation instruments must be **objective**, meaning that the personal opinions of the trainer do not affect the scoring process. Evaluation instruments must also be **reliable**. To be reliable, an instrument must measure the achievement of the learning objectives consistently each time it is used.



In addition to instruments for evaluating the learners, a learner satisfaction form for the course should be developed or adapted. Learners complete this form at the end of the course to provide feedback about the training (e.g., satisfaction with the course content, trainer's training skills, course logistics).

If existing training materials—including evaluation instruments and the learner satisfaction form—are being adapted, it is essential that the instruments and form be revised to ensure that they are consistent with the goal and learning objectives of the course being designed.



In your training designer role, you should:

- Make sure that knowledge, skill, and attitude evaluation instruments are valid, objective, and reliable
- Develop appropriate knowledge evaluation instruments
- Develop appropriate skill evaluation instruments
- Develop a learner satisfaction form





Delivering Training

Establish and maintain credibility

A skilled trainer inspires learners to learn. By demonstrating expertise in the content area, using strong training skills, and describing clearly how the course goals and learning objectives relate to improving the learners' work performance, the trainer establishes credibility and thus inspires learners.

Tips for Delivering Training

- Review the guidelines for delivering training as you prepare to conduct the course
- Develop one or more checklists of training delivery and presentation skills and use these as self-assessment tools or to observe other trainers and provide feedback on their performance
- Videotape trainer presentations and use these guidelines to evaluate delivery and presentation skills, for self-assessment or for assessment of other trainers
- Use the guidelines to reflect on your own performance as a trainer



In your training delivery role, you should:

- Arrive early for the course every day (but especially on the first day)
- Greet the learners individually and as a group (especially on the first day)
- Learn the names of the learners quickly
- Describe the design of the training course clearly and thoroughly
- Encourage the learners to ask questions
- Refer to your own experience and credentials modestly and in ways that are appropriate for the group
- Model positive behavior and attitudes that support the course goal and learning objectives
- Explain roles, responsibilities, learning objectives, expectations, and group norms clearly
- Provide opportunities for learners to share their expectations
- Respect and build on the knowledge and skills of learners

Conduct training in a responsive and collaborative way

Training is much more than the trainer standing in front of the room, lecturing to a group of learners. Effective training means that the learners are partners in the learning experience and actively engaged in learning new knowledge and skills. To accomplish this partnership, you must be sensitive to cultural and social diversity. You need to balance the training plan with the more immediate interests of the learners (e.g., if they want to talk about other topics or learn different skills).



In your training delivery role, you should:

- Collaborate and build relationships with learners and their supervisors, as well as other trainers



- Adjust your training and communication style to meet the needs of the learners based on your observation of how they work as individuals and in groups
- Exhibit energy by interacting with learners, asking effective questions, presenting with intensity, and using humor appropriately
- Handle problems and challenges effectively and courteously
- Dress consistently with local norms
- Always be on time

Create a learning environment where participants feel comfortable and safe

A safe learning environment is one where learners feel comfortable to try out new ideas, learn from others, explore new viewpoints, and change attitudes and behaviors. A safe learning environment includes all learners, respects everyone's viewpoints, and supports the learners and their needs.

In your training delivery role, you should:



- Respond politely to naive questions
- Use a variety of learning approaches (e.g., role plays, case studies, simulations, competitions) as outlined in the training plan, with content based on the learners' performance needs
- Sustain collaborative relationships among learners, trainers, and supervisors
- Respect answers and viewpoints different from yours, do not belittle learners or other trainers, and offer feedback in ways that are socially appropriate for the ethnic or cultural groups represented in the training
- Encourage learners to try out new behaviors and skills, and provide encouragement and positive feedback when they do
- Manage any negative individual or group behaviors



- Help learners to feel comfortable to fully participate in the training and learn from one another as well as from the trainer
- Provide opportunities for learners to answer questions raised by their peers
- Encourage learners to explain training messages to their peers
- Celebrate “small wins” and positive progress with the whole group
- Create a climate of fun by doing things the learners enjoy and find humorous or engaging
- Help and encourage the learners to look at situations from different perspectives

Provide supportive feedback

In a safe learning environment, there are opportunities for learners to ask questions, make comments, share concerns, and ask for feedback on their performance. The trainer should share observations about the learners’ progress in a way that maintains and preserves their self-esteem. This is especially important when a learner has given an incorrect answer or is not performing well.

The skilled trainer creates opportunities to motivate each learner and to reinforce key messages in the training sessions. Often, the best opportunities for reinforcement occur spontaneously as the group works together. For example, a learner may make an observation that reinforces a key message. At that time, you recognize the learner for contributing, and then repeat the message. You should also seek out opportunities to learn from learners and to encourage new viewpoints.

Whenever possible, allow learners to answer their own questions and those of other learners. This helps learners address their own learning needs, synthesize new knowledge, apply new skills, and help one another learn.



In your training delivery role, you should:



- Provide positive, timely feedback to learners when they have performed well
- Follow the progress of the learners during activities, and provide direct, specific feedback to reinforce accurate responses and correct inaccurate responses
- Validate learners' questions, feedback, and concerns, while preserving their individual dignity and self-esteem
- Listen carefully for learners' feedback about their learning needs and respond accordingly
- Add your own suggestions to feedback from the learners about what should be changed to improve the quality of the training experience and meet training requirements, and how those changes should be made

Use effective communication and presentation skills

Use a variety of communication and presentation skills, even during a single session, to engage learners, keep their energy level high, maintain interest, and avoid a repetitive presentation style. Oral and written communications for the learners should be short and to the point. Check learners' understanding of communications by asking them to rephrase and summarize key messages. Learners will use their own words and cultural concepts. This will help the trainer understand how to make communications more appropriate for the group of learners. The trainer should continually monitor the learners' interest and attention to content and modify the approach as needed.

In your training delivery role, you should:



- Tailor verbal and non-verbal communication to the learners' culture and needs



- Give clear and concise directions
- Use a variety of instructional media (e.g., flipcharts, transparencies, anatomic models, printed materials, and technology-based methods) appropriately to enhance instruction and involvement
- Ask learners to share their viewpoints so that the training can build on their knowledge and backgrounds
- Explain concepts and procedures clearly
- Use memorable or vivid examples to illustrate key points
- Reinforce essential or critical messages
- Use voice, gestures, silence, movement, posture, space, and appropriate equipment, supplies, and other objects to support and enhance learning
- Ask questions and encourage interaction
- Use culturally appropriate anecdotes, illustrations, analogies, and humor to enhance learners' understanding and involvement
- Check learners' understanding by asking questions, assessing responses, conducting informal conversations, and observing practice sessions
- Change the presentation approach in response to cues from learners
- Use techniques such as learning journals, action plans, and peer support to identify ways to apply newly acquired knowledge and skills on the job

Use effective facilitation skills

Effective facilitation skills help to create a safe learning environment. Common facilitation techniques include summarizing, clarifying, paraphrasing, acknowledging, questioning, and directing learners' contributions to other learners and/or the group as a whole. Learning methods requiring facilitation skills include small group activities, case studies, role plays, games, and discussions.



In your training delivery role, you should:



- Use a variety of facilitation techniques
- Help learners to distinguish between fact and opinion during discussions
- Summarize or conclude learning experiences by asking questions about the experience, comparing and contrasting learners' responses, and helping them to draw conclusions about the objectives of these experiences

Provide opportunities for practical application of knowledge and skills

Learners must have opportunities to practice their new knowledge and skills in a realistic setting. This is the only way they will be able to apply (or transfer) their learning to their actual work site.

In your training delivery role, you should:



- Ensure application of knowledge and skills by providing appropriate learning opportunities drawn from real-life experiences, such as simulations, role plays, games, and case studies
- Demonstrate skills using anatomic models, role plays, and commonly available equipment
- Have learners practice these techniques before you give them feedback
- Link conceptual approaches to real-world applications by providing guided practice at clinical sites
- Show in a variety of ways the on-the-job benefits of meeting the learning objectives
- Assist learners with planning how they will apply their new knowledge and skills on the job

Monitor the process of training and make adjustments, as needed

A well-managed course is one where all of the required supplies and equipment are available, the



training room is comfortable, and sessions begin and end on time. In addition to managing the physical environment, continually assess learners' progress to help them achieve the learning objectives. Gather information informally by asking questions during breaks and meals, building in time for comments on the previous day's learning or daily summaries, and conduct exercises reflecting the day's content. When problems arise or changes must be made, adjust the course schedule and proceed accordingly.



In your training delivery role, you should:

- Manage the physical environment to be sure it supports learners in mastering the learning objectives
- Prepare for the use of audiovisual equipment and have a back-up plan in case of problems
- Modify the media used to accommodate the needs of the learners and the realities of the situation
- Manage time well to ensure that all learning objectives are met
- Listen to the learners for evidence of learning and engagement
- Observe individual and group behaviors
- Ask for feedback on content and delivery and encourage learners to share new ideas to improve the learning experience
- Make appropriate adjustments during the current training day, as well as adjustments to the next day's schedule
- Make changes in the original design, based on learners' feedback gathered directly through questions, or through observation of their progress
- Interact with learners during meals and other free time





Evaluating Training

Determine learners' satisfaction with training

Instruments that measure learners' satisfaction help improve training and determine whether training has met learners' needs. Learners may discuss the course in small groups or complete a form. Most forms include a rating scale and open-ended questions that ask what the learners think about the training materials and activities, the trainer, and the training environment. Learners may also indicate what helped and hindered their learning and the

Tips for Evaluating Training

- Ensure that knowledge and skill evaluation instruments are developed and ready before the course
- Ensure that there is time allotted in the course schedule to administer knowledge and skill evaluations and to provide feedback to learners
- Plan with trainers how to use information from these evaluations to revise the course design and training materials
- Plan how to monitor and evaluate performance of the learners on the job after training and how to coordinate this with followup support visits

relevance of the content to their jobs. Asking learners what they think helps them to have a positive attitude about the course. The evaluation process tells learners that you are committed to the training and their learning, and that the people designing, managing, and delivering the training want the course to fit the needs of future learners.



In your training evaluator role, you should:

- Use a learner satisfaction instrument to gather information on what the learners think about the training materials and activities, the trainer, and training environment
- Give learners the opportunity to comment on the relevance of the training objectives and content to their jobs
- Allow sufficient time for learners to complete the instrument or speak with the trainer
- Share the results of learner satisfaction instruments with training managers and designers

Determine whether learners have met the learning objectives by giving and scoring knowledge evaluations

Knowledge evaluation, when it is part of the course design, is one of the most effective approaches to determining whether learners have met the learning objectives of a training course. At the beginning of the course, the learners must know what the objectives are and how achievement of the objectives will be measured. Learners should know when the knowledge evaluation instrument will be given, the format of the instrument (e.g., multiple-choice test, oral examination), and what score they must achieve to demonstrate that they have met the learning objectives.



To measure changes in knowledge, give a knowledge evaluation (pretest) at the beginning of the course as well as an evaluation at the end of the course (post-test), and compare the learners' scores. Often, the pretest contains the same test items as the post-test.

In your training evaluator role, you should:



- Tell learners how and when evaluation will occur, including the criteria to demonstrate achievement of the learning objectives (e.g., 85% correct)
- Make sure that learners know the learning objectives at the beginning of the course
- Give a knowledge pretest and let learners know their results in order to identify knowledge areas on which they need to focus, and provide a baseline knowledge assessment for comparison with the knowledge post-test
- Make enough copies of the knowledge evaluation instruments before the course so that each learner has a copy
- Give the knowledge evaluation in a quiet room with no interruptions, and with all required supplies available
- Remain in the room while learners complete the knowledge evaluation so that you can answer any questions they may have
- Give learners enough time to complete the knowledge evaluation
- Give learners immediate and confidential feedback regarding their performance on the knowledge evaluation
- Have a plan for learners who do not meet the criteria required to demonstrate achievement of the objectives (e.g., study and retake the test, repeat the course)



Determine whether learners have met the learning objectives by giving and scoring skill evaluations

When skill evaluations are part of the course design, they are given to determine whether learners can competently perform the skills outlined by the learning objectives. At the beginning of the course, the learners must know what the objectives are and how achievement of the objectives will be measured. Learners should know when skill evaluations will be given, have copies of the performance checklists or other evaluation instruments, and know if evaluation of competence will occur during simulations (e.g., role plays, work with anatomic models), with clients, or both. Learners should also know how well they must perform the skills to demonstrate achievement of the learning objectives (i.e., how the performance checklists will be used to measure their skill competency).

Pretests of skills are more time-consuming and logistically difficult to give than pretests of knowledge and are therefore not always used. They may be necessary, however, to determine if learners have requisite skills or to measure changes in skills as a result of training. One option in this case is to pretest only a sample of learners and evaluate their pre-training skills using simulations.



In your training evaluator role, you should:

- Tell learners how and when evaluation will occur, including the criteria for demonstrating achievement of the learning objectives (e.g., perform a skill according to the steps in a checklist—first during a simulation and then with a client)
- Make sure that learners know the learning objectives at the beginning of the course
- Administer a skill evaluation at the beginning of the course and give learners immediate feedback



on their performance in order to identify skill areas on which they should focus and provide baseline skill assessment data to compare with the end-of-course evaluation

- Make enough copies of the skill evaluation instruments before the course so that each learner has a copy
- Make sure that all of the required supplies (e.g., gloves, instruments) are present before administering the skill evaluation
- Give learners enough time to complete the skill evaluation
- Give learners immediate and confidential feedback after the evaluation
- Have a plan for learners who do not meet the criteria required to demonstrate achievement of the objectives (e.g., practice using simulations and then be evaluated with clients, repeat the course)

Improve training using information from the knowledge and skill evaluations

Systematic evaluation and revision of training improves the quality of training and reduces “guesswork” when making changes to courses, training materials, and the overall training plan. Use information from the evaluation to determine when a course should be revised. This information will also guide the specific revisions necessary to improve the quality of the course. There are four sources of evaluation information:

- informal information from learners,
- measures of learner satisfaction,
- measures of knowledge acquired during training, and
- measures of skills acquired during training.

The opinions of the trainers who deliver the training should be taken into account, but their opinions



alone are not adequate substitutes for the evaluation information listed above.



In your training evaluator role, you should:

- Collect evaluation information using a standard and systematic approach
- Develop evaluation criteria before training to help in judging information from the evaluation
- Meet with designers, trainers, and evaluators to review evaluation information at the end of training
- Use the evaluation information to make decisions about *what part(s)* of a course to revise, *when* to revise them, and *what specific changes* to make
- Develop a plan for revision of training
- Share information from past evaluations with trainers to enable them to prepare for training

Monitor and evaluate performance on the job

A key aspect of evaluating training is to monitor and evaluate the performance of learners when they are back on their jobs to find out whether training resulted in improved job performance. This typically requires followup visits to the job sites of the learners. Ideally, the trainer who delivered the course conducts these visits. At each site, the trainer meets with the supervisor and observes and coaches the worker using the same performance checklists used during training. Observations of learners after training will provide information to determine whether training is making a difference.



In your training evaluator role, you should:

- Develop and implement a monitoring and evaluation plan for followup visits after training
- Conduct followup visits to observe learners on the job



- Collect performance information on the job after training
- Collect information from the worker's supervisor
- Use information about learners' performance to determine the impact of training (i.e., the extent to which performance has changed due to training)

Determine the effectiveness of training as an intervention to improve performance

It is sometimes necessary to document the overall value of investments in training. Evaluation information will show whether training closed the performance gap identified by the PNA. Policymakers and program planners also can use this evaluation information outside of the training program to help determine the value of training as an intervention to improve workers' performance.

In your training evaluator role, you should:



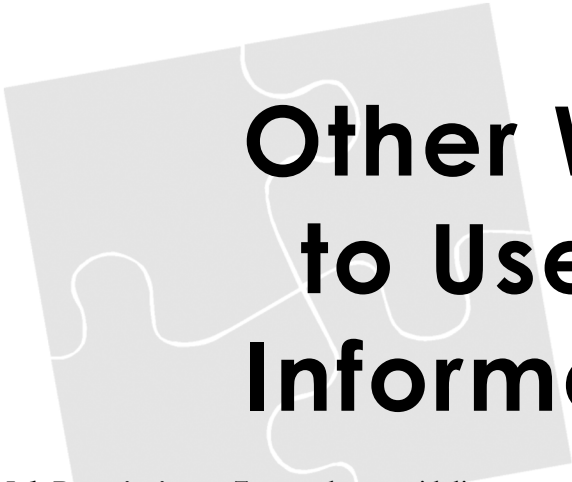
- Have mechanisms for sharing evaluation information with stakeholders
- Write evaluation reports using words and terms used by decision-makers
- Document the value of training as an intervention to improve performance
- Present high-level information about the impact of training rather than information about learners' satisfaction or knowledge and skill gains
- Incorporate information about training impact into ongoing PNAs
- Report on the monitoring of training accomplishments and impact of training



40

My Notes:





Other Ways to Use This Information

Job Descriptions—To use these guidelines to develop a job description for a trainer, training manager, designer, or evaluator, you can:

- Determine those stages or areas of training for which the individual will be responsible
- Review the information about those stages
- Ensure that the applicable tasks and responsibilities appear in the job description
- Determine if there are other job requirements (e.g., a specific technical and clinical background) to be included
- Develop a draft job description
- Ask others familiar with the position to review the job description to ensure that it accurately describes the major roles and responsibilities

Training of Trainers—To use these guidelines to train trainers, you can:

- Review the trainer's job description and the guidelines that are relevant to the particular training to be conducted
- Identify the specific guidelines that apply to the course being conducted
- Apply the guidelines for designing training to the design and development of the training skills

course (i.e., we should try to do for the trainers what we expect them to do when it is their turn to conduct training)

- As you apply these design guidelines, determine if more than one course is required to train the trainers (e.g., a training skills course, an instructional design course)
- To help put the training in context, ensure that it includes an orientation for the new trainers to the training design and materials they will use when they conduct training
- Plan how you will follow up and assist new trainers as they conduct their first courses

National Training Guidelines—To use these guidelines when developing national training guidelines, you can:

- Identify those responsible for developing and implementing national training guidelines
- Work with stakeholders to clarify the need for training guidelines and to review any existing national guidelines
- Develop a national-level team to develop training guidelines
- Work with the team to review the guidelines contained in this handbook along with guidelines from other sources
- Develop draft guidelines and ask stakeholders from various levels within the country (e.g., from the ministry of health to trainers of community health providers) to review the guidelines
- Develop plans for disseminating and implementing the training guidelines

Project Training Component—To use these guidelines in the development of the training component of a project, you can:

- Refer to these guidelines in project descriptions and requests for technical assistance to ensure



use of standard terminology and realistic expectations

- Ensure that the project includes a performance needs assessment to provide direction for the implementation of training
- Ensure that the project includes a monitoring and evaluation component to determine the effectiveness of training
- Ask that project proposals refer to these guidelines to ensure that competing proposals are using similar terminology and approaches for the management, design, delivery, and evaluation of training

If you want to know more...

Would you like to read more about training? Below are some publications you may find useful:

From Family Health International:

Interactive Reproductive Health Training = Interesting and Innovative Training. 2003. Presentation at “Training in Africa: Best Practices, Lessons Learned and Future Directions” conference. Lusaka, Zambia. (August)

From JHPIEGO:

Schaefer L et al. 2000. *Advanced Training Skills for Reproductive Health Professionals.* JHPIEGO Corporation: Baltimore, MD. (Corresponding Participant’s Handbook and Trainer’s Notebook are available.)

Sullivan R and L Gaffikin. 1997. *Instructional Design Skills for Reproductive Health Professionals.* JHPIEGO Corporation: Baltimore, MD. (Corresponding Participant’s Handbook and Trainer’s Notebook are available.)

Sullivan R et al. 1998. *Clinical Training Skills for Reproductive Health Professionals,* second edition. JHPIEGO Corporation: Baltimore, MD. (Corresponding Participant’s Handbook and Trainer’s Notebook are available.)



ModCal® for Clinical Training Skills. 1999. JHPIEGO Corporation: Baltimore, MD. (Modified computer-assisted learning package includes CD-ROM, Reference Manual, Trainer's Notebook, and Participant's Handbook.)

From Prime II/IntraHealth International, Inc.:
Long PJ and NE Kiplinger. 1999. *Making It Happen: Using Distance Learning to Improve Reproductive Health Provider Performance*. IntraH: Chapel Hill, NC.

PRIME. 1997. *Reproductive Health Training for Primary Providers: A Sourcebook for Curriculum Developers*. IntraH: Chapel Hill, NC.

PRIME II and JHPIEGO. 2002. *Transfer of Learning: A Guide for Strengthening the Performance of Health Care Workers*. IntraH: Chapel Hill, NC.

Are you interested in knowing more about training? Would you like to order the publications listed above? Here are some websites where you will find resources related to managing, designing, delivering, and evaluating training:

FHI:

www.fhi.org

JHPIEGO:

www.jhpiego.org

www.reproline.jhu.edu

Population Leadership Program:

www.popldr.org

PRIME II/IntraHealth:

www.prime2.org/prime2/techlead/home/49.html

TRG:

www.trg-inc.com

