UNIT-6 Developing a Training program

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Describe the essential elements of a training program
- ✓ Apply different methodologies to program design
- ✓ Demonstrate skills in preparation, research, and delivery of strong content
- ✓ Explain an instructional model
- ✓ Be prepared to create a training program proposal

Unit 6
Program Design

Training Program Considerations

Getting Started

You may have been told that the first element that you need to undertake in designing a training program is a **needs assessment**. We will get to that shortly, but there are some other factors to consider even before you undertake the needs assessment.

The best training programs are not designed in a back room somewhere. They are developed with up-to-date knowledge of the organization's goals and priorities, as well as knowledge about the needs, skills, and circumstances that the training will address.

Before you start designing your training program, you need to consider how the program will fit into your organization's overall plan, how it can grow with the company, what role it will play in the organization, and what support it may receive.

Fitting Into the Plan and Future Growth

A training program and its supporting curriculum should be used as planning tools that help employees to meet and even exceed defined performance standards. As a planning tool, the program must remain flexible to meet the needs of the organization as it changes over time.

The Program's Role

Typically, courses offered as a part of a defined program are required or recommended for certain roles or functions within the organization. More recently, many companies also offer courses that are not directly related to a specific function, but that support the overall needs of the organization. For example, courses might be supported if they will help employees lead a healthier lifestyle (exercise, fitness, or achieving balance) or improve employee satisfaction through development courses related to image (what to wear to impress or business lunching).

Support From Within

Traditionally, training has taken the form of workshops or classroom learning inside the workplace. However, career counseling and tuition reimbursement plans (where you choose the course you would like, make your case to your employer, and they reimburse you upon successful completion of the course) may also be supported. Make sure you choose the method of training that is right for your program. If the training you plan to offer is needed only by a few employees and the program is offered by a local college, it may be best to consider something like tuition reimbursement rather than developing the program yourself.

When is Training Necessary?

Here are some indicators or signals that may suggest a need for training. What type of training might be appropriate for each?

Signal	Type of Training

Alternatives to Training

Think of some creative ways that you could present these training concepts.

Communication Strategies

Team Building

Time Management

Organizational Skills

Motivation Training For Supervisors

Sales and Marketing Skills

Negotiation Skills

Essential Elements

There are several essential elements related to developing your training program.

First, the training program needs to benefit the organization and employees in order to:

- Develop skills, knowledge, and attitudes that will enhance an employee's ability to perform the functions of their job.
- Demonstrate an organization's commitment to employee development.
- Receive support from management and executives.
- Encourage advance planning by managers for budgeting and scheduling.
- Provide employees in similar roles with the same language and skills to meet their objectives.
- Have meaningful information that employees and their managers can refer to during performance and evaluation meetings.
- Reflect the current business plan.
- Have a mechanism for managers to provide feedback and suggestions for ongoing development needs of their staff.

An organizational training program should provide the following learning opportunities:

- Enable individuals to learn about their current role and responsibilities
- Improve their effectiveness on the job
- Prepare for promotion or leadership opportunities

The curriculum may be divided into broad training categories in areas such as:

- Leadership (supervisory skills, coaching, performance feedback)
- Personal effectiveness (time management, goal achievement)
- Customer service (for internal and external customers)
- Equipment and technology
- Industry specific courses

A training program often provides courses that are mandatory, recommended for certain roles, or optional. Mandatory courses are tied directly to performance standards, quality guidelines, and in some cases legal requirements (for example, having the required number of staff trained in first aid). The best way for you to determine what training is needed and why is by conducting a training needs analysis, which we will discuss shortly.

Communicating Training

After your program has been approved and developed, you can create a training calendar to let employees know what learning opportunities are available from the organization.

Write any notes about the sample training calendar here.

Identifying Needs

The ICE Method

One of the key elements of your training program is the **needs analysis**. This formal type of assessment will help you identify the following:

- The objectives of the organization
- Gaps between what employees currently know and what they need to learn
- Training that is required
- Training that would be nice to have
- When training may not be needed
- When training is not the right approach
- The benefits and negative aspects of providing training
- The type of training that is appropriate
- The best approaches to deliver effective training
- A method for collecting feedback and evaluating the program

When is Training Not Appropriate?

When there are problems within an organization, the first answer may be to offer training to staff. When staff are bickering and fighting, we may want to offer training in anger management or conflict resolution. When a new process or tool is introduced, we offer skills training.

Whether the training focus is knowledge, skills, or attitude (collectively known as KSA's), training may be the best approach. However, there are other factors that can lead to sub-optimal performance on the job.

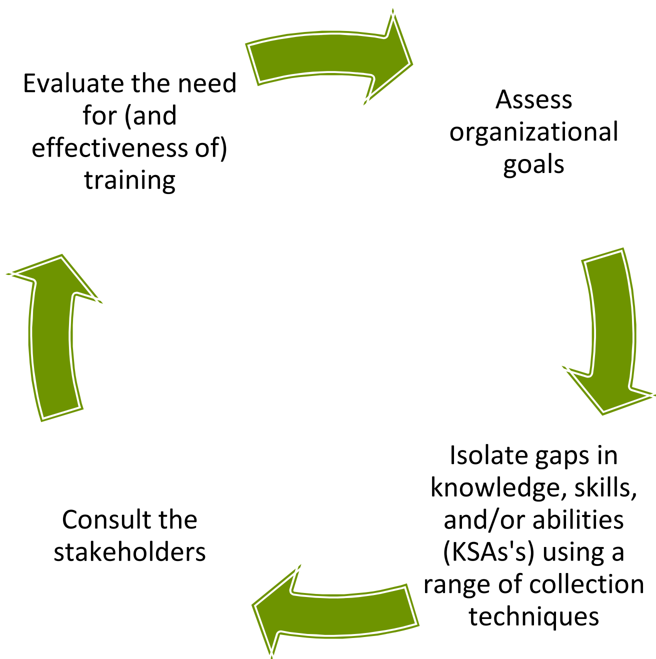
When these issues are present, training is not going to resolve the problem.

- Unclear feedback or unclear performance expectations. If people do not understand what they are required to do, how will they meet the objectives?
- Lack of resources (tools, materials, equipment) needed to do the job.
- A poor match between the employee's skills and the job requirements.
- Factors stemming from illness or injury, such as pain, depression, symptoms of stress, or decreased ability to cope.

Three Steps

When you are ready to undertake the training needs analysis, using the term ICE will ensure that you include all of the necessary steps.

- **Isolate** the problem.
- **Consult** with appropriate stakeholders to and assess the effect the problem is having on the organization.
- **Evaluate** options and set up an action plan that meets organizational needs and assemble the support that you need.



Isolating

Isolating the problem effectively will help you to determine whether there is one main issue, or whether several smaller issues are having a significant impact. Several techniques are available to you in this process, and each has its own benefits and shortcomings. Sometimes a mixed approach is best if time and resources are available, in order for you to get the most comprehensive answer.

Techniques may include observation of people as they work, questionnaires, consultation and interviews, testing, reviewing work samples and researching documentation included in employee evaluations, policy manuals, audits, program reports and so on.

You are looking for **surface problems**, such as an obvious need for skill development, where employees need to learn new skills in order to perform their tasks effectively. You also have to be able to identify **underlying problems**. The underlying issues can be more difficult to define, but they are an important part of a thorough analysis.

An additional benefit of isolating the problem is that it can help you to obtain **background material** that you can draw on for training. Using real, concrete examples in your case studies and training examples makes the training much more meaningful for participants. In addition, trainees who do not enjoy training, or find it difficult to learn from artificial scenarios, are more successfully engaged in training that uses real examples.

Consulting

Sometimes employees would like training, but that training does not support the needs of the organization. You will find it very difficult to gain approval and resources for training that does not fulfill the strategic plans of the organization.

At the same time, if the company is not aware of gaps in an employee's knowledge, then part of your role can include reporting where the problems are and resolving them by designing an appropriate training plan. If you can identify the problem areas, relate them to the organizational strategic plan, and demonstrate the value of training to the organization (their return on investment, or **ROI**), then you are much more likely to receive support for the training initiative.

For example, an employee with excellent technical skills who gets promoted to a supervisory role needs to understand the dynamics of leadership, motivation, and performance management. Training can help solidly establish the person in their new role, which can often be challenging when a team is making a transition from having a co-worker become their new boss. Training will also help the new supervisor gain confidence and understanding of their leadership role. These key skills will help the new manager work more effectively, meaning the company gets more for their money.

Evaluating

Next, you will thoroughly examine the results of your interviews and investigation to **determine what training is required**. At this stage, you may discover that training is not the best option for some issues. This can be the case where, for example, staff are not meeting their goals because of performance issues, unclear expectations about their roles and priorities, or interference caused by medical issues.

Depending on the needs identified, you will also determine the best **methods of training** to use and include that in your training needs analysis. Adults learn in different ways, and using a variety of training methods keeps learners engaged and interested.

On the job training, mentoring, workshops, seminars, conferences, peer training groups, cross functional experiences, teleconferencing, and webinars are just some of the ways to enhance traditional classroom experiences. In addition, varying the time allocated or location can also enhance training.

Building Your Training Needs Analysis

Case Study

As the new Human Resources manager, you have hired a new training coordinator (TC). Your design and printing company has 200 staff. This company has never had anyone formally provide any training before, but the owner of the family run organization wants to make sure people have the skills they need, and he also wants to promote the company as a leading organization in order to attract more staff. The owner is also aware of some morale problems, and he has shared this with you and the TC.

The organization has a sales team where sales people provide service to existing customers who come to them for high end printing and design work for catalogs, brochures, posters, letterhead, and websites. They also market services to new clients around the globe.

There is also a technical team consisting of a computer analyst and a networking specialist. These people keep the systems operating. There are also several graphic designers on this team who create artwork and design for clients in the form of Websites and paper based promotional materials. They work with several different computer applications in order to provide customers with what they want. At present, this team is working a lot of overtime to meet their deadlines.

Next, there is a production team who produces the print materials. Manuals, books, brochures, and specialty print jobs are just some of what is created. Part of the staff on this team works within a small call center environment where they can take orders, answer quick customer questions, or direct them to the appropriate sales or design staff.

The corporate services team looks after human resource functions, health and safety, payroll and benefits, and finance.

The TC's first goal is to get familiar with the organization and introduce himself to the staff. On his first day, you watch as he goes to the lunch room to have a break and see if there is anyone available for casual conversation. There are about eight people in the lunch room, and they enthusiastically welcome the TC. As the conversation gets underway, someone mentions that they would love to take a course on marketing; something that the sales people in the room agree would be helpful. Most of them started in other areas of the company (design, printing, or production areas) and have had no formal sales training. In addition, the people gathered around the table note that there is no formal marketing role in the organization, except what is offered by the sales team and some support through a senior designer (one of the family members who originally founded the company).

A support staff person mentions that she would really like an English course, because although her conversation skills are developing, she does not have the technical background in the industry, and she finds that she is struggling now that she has to answer customer calls. She has been speaking English for about two years.

One of the designers mentions that there is a new software package installed on their machines but no one has had the time to figure out how it works yet. They know that the software will help make them more effective and give them the ability to do more creative and cutting edge work. Usually one of the team will figure out a new program and teach the others. Lately, they have been so busy that having the time to figure out the program has been impossible.

The health and safety advisor says that he would like to see a wellness program started as part of the overall health plan with the company. He suggests that he would really like to get a fitness pass for everyone in the building as a way to encourage them to get fit. He would also like to personally take a yoga class, since it helps him to relax and stay focused at work.

Watching the training coordinator, you can see that he is respectfully listening to what people have to say, and you are impressed that he does not commit to train them in every area, but promises to take a close look at things. You also notice that as the staff talk openly about what they want for training, the discussion takes on a negative tone (“Well, they’d never agree to do that,” and, “We asked for that two years ago, and it never got us anywhere.”).

As the TC leaves the lunchroom, you gather up your things to follow him and invite him to meet for coffee later this afternoon. In your new role as Human Resources manager, you want to offer him some debriefing and support following the lunch room conversation.

Discussion Questions

What gaps exist between what people know and what they need to know in order to do their jobs?

What training is required?

What training would be nice to have?

What type of training would be appropriate (workshops, seminars, external courses, training on the job, mentoring, etc.)?

What information is missing that would help the TC make these training decisions?

The Training Model

Basic Principles

There are many training models on the market today, and many of them are extremely useful. Our goal is to present a model that you can use now and adapt over time as you become more familiar with training and fine tune it to meet your needs.

Some basic principles that apply to developing training are presented here for you to consider as you make your way through the remainder of the program.

Moderation

As trainers, we often want to squeeze everything that we know into a training session. We are passionate about training and learning! Sometimes our excitement gets the better of us and we move into lecture mode, telling trainees everything we know and trying to cover every point that we can. Lecturing is not training, however, and is not normally a suitable approach for adult learning, especially in the workplace. If your goal is to actually provide an information dump (providing lots of data and statistics), arrange a meeting, rather than masking it as training. Look closely at your objectives and determine how much content is required to cover those objectives. Sort through what the learners need to know and set those as priorities. The nice to know aspects are only included if there is ample time.

Keep your training material selective so that the training can take place at a reasonable pace. Trainees will forget a good portion of what you say and introduce them to (which is human nature, so try not to worry about it!), so focus your efforts on the critical objectives, and include activities and experiences that reinforce the most important concepts. Your trainees will benefit by receiving a richer experience, and you will be able to train at a more meaningful level.

Balance

In order for trainees to get the most from their learning experience, objectives need to focus on key areas. Sometimes training just focuses on one area, but the mistake is that they may learn information but not have the ability to take action on what they are learning. Balancing your training to appeal to affective, behavioral, and cognitive learning will lead participants to look at themselves and how they relate to what they are learning.

Your training design needs to include ways to:

- Foster appropriate attitudes
- Develop and practice skill
- Understand concepts behind the objectives

Involvement

Involve the learners actively in training. Adults do not make good sponges! They need to know what the purpose of any training is and how they can apply it in order to stay engaged. When training draws from their past experiences and builds on what they already know, learning is more effective. However, sometimes we need to unlearn something that we have been doing for a long time before we can learn something that is new, so it is also important to have reflective time and the opportunity to unlearn during training.

Continue Learning!

As important as your content is, it is also important that trainers continue learning as well. Training evolves, just as any industry does, and keeping up on your own development is as important as the instruction that you design. Have you ever attended a workshop where you knew more than the trainer did? Or had an experience with a trainer who was late, disorganized, or a poor speaker? Your own attitude toward learning and professionalism will be demonstrated in how you conduct yourself, so make sure that your own development is a priority!

Building an Engaging Program

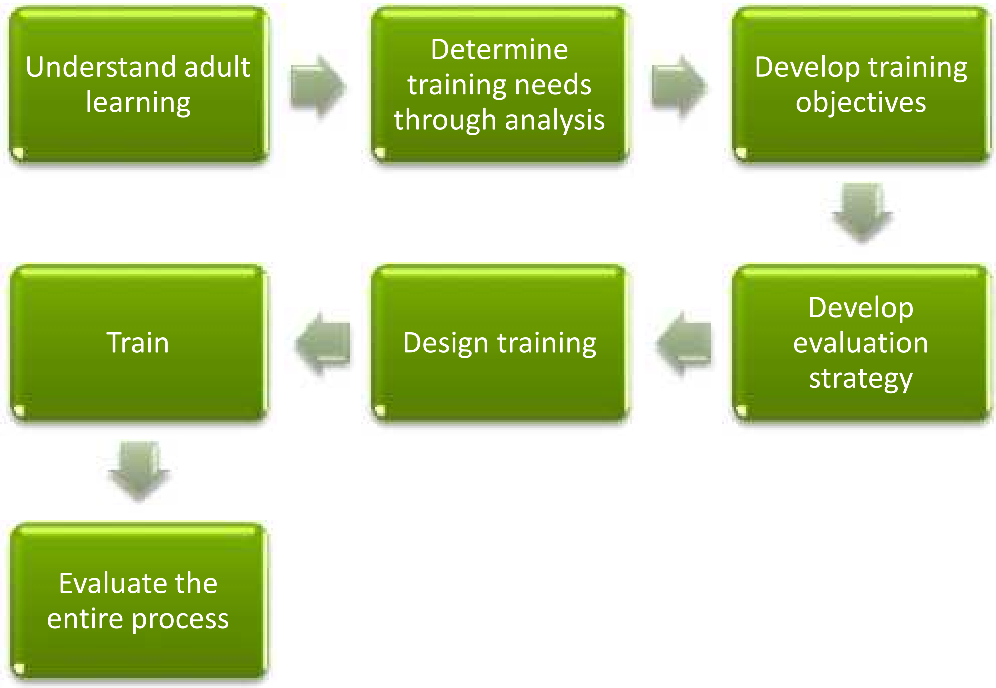
Establishing an instructional system is a collaborative process, even if there is only one trainer in the organization, and even if you are an independent trainer with your own business and provide workshops to the public. Understandably, then, sometimes we can have more collaboration than at other times.

If no feedback or collaboration is available, you can still design and implement an **effective and engaging program**. You will draw on your own knowledge of the participants and what they need. If you have mastered the ability to flex your program on short notice (and even on the fly), these recommendations can help you gather additional information.

- Contact someone who is familiar with the participants (such as a supervisor, manager, or another trainer that has worked with them).
- Contact a few of the participants and ask them some key questions. If they are representative of the group as a whole, then you have the answers that you need. If they aren't representative, you still have more information than you did before you contacted them.
- Have relevant material delivered to you in the most effective way that you can (such as fax or e-mail).
- Have your training area set up early so that you can greet participants as they arrive and spend some time chatting casually with them.
- Design activities at the beginning of training that will allow you to gather information about the group.

Often, time frames can become shortened or rushed when a need for training appears unexpectedly, or the organization is undertaking big changes. Having a system in place, and being flexible and adaptable, will help you get through the situation with the least amount of frustration.

Instructional Systems Design Model



In order to train, teach, mentor, or coach adults, we have to **understand how adults learn**. Although everyone has gone to school, where the preferred teaching methods are normally based on lectures or visual exercises, many adults do not prefer to learn from lectures.

In order to become an effective trainer, which includes being able to present compelling programs, we recommend that you do additional studying and development in the area of adult education. Your own knowledge will be the foundation of what you bring to your instructional systems design.
In order to develop a strong understanding of how adults learn, it is also important for you to understand what your own **learning and teaching preferences are**. As you develop a better understanding of yourself, you can also develop a better understanding of how people learn.

The Program's Basic Outline

Learning Objectives

Determining Objectives

There are many ways that you can design a program, as we discussed earlier. Following the model that you explored this morning, our next steps include determining learning objectives and evaluation strategies.

At the program design stage, you probably won't include every single learning objective that the program will encompass. **Usually, objectives are broadly defined at the program design level**, and then more narrowly defined at the lesson planning stages.

It is common to see objectives start with a phrase such as "By the end of this training, participants will…" We have deliberately left that phrase out of these statements to help you to focus on the essential message.

For example, when designing a program for training supervisors the essential elements of health and safety, the program objectives may include:

- Becoming familiar with the basic concepts of health and safety legislation
- Understanding the elements of complete incident investigations
- Apply hazard and assessment and control factors
- Explore the fundamentals of safety inspections
- Explain the basic elements of disability management and return to work planning

Within each of the bullets above, however, several objectives will be further defined in the process of planning the actual courses. In the case of the second bullet (understanding the elements of complete incident investigations), the objectives would be **more narrowly defined as**:

- Define key terms such as near miss, incident, serious accident, direct cause, root cause
- Explain the purposes of incident investigation
- To report and investigate an incident
- Analyze incidents for cause, and calculate the effects
- Provide concrete recommendations based on cause analysis

Your objectives can be enhanced by including a measurement standard to ensure that trainees understand the expectations placed upon them. This will also give you an effective way to document the learning that has taken place.

Common measurement terms include:

- Accurate on ____ out of _____ attempts.
- At least ______ percent correct.
- At least _____ per hour.
- In the correct sequence.
- With no more than ____ errors.
- While following all safety rules.
- Within ____ minutes.

Considerations When Writing Objectives

Target Audience

As you think about your objectives, also consider your target audience. This allows you to focus the objectives specifically on what the trainees require, which makes the most of training resources that are available to you. A course that is designed for brand new sales people will consist of different objectives than one for sales executives with twenty years of experience. Similarly, a course on anger management strategies will be different for front line staff than managers who look after those same front line staff. The more you know about your intended audience, the more meaningful (and less generic) your training program can be.

If you are assigned a training program but are not familiar with the participants, an informal survey of managers, previous trainers, and the trainees will help you get to know them. If time is short or you are conducting a public training session where that information is not available, having some different activities or approaches to parts of your material will allow you to make changes on the fly if possible.

Prerequisites

If it is necessary for trainees to have some familiar level of knowledge before undertaking training, then identifying prerequisites (courses that must be successfully completed prior to the current training course) is a helpful tool. With adult learners it is also helpful to remain open to equivalencies as well, meaning that if a trainee does not have a particular prerequisite course but has sufficient experience in the subject matter or can demonstrate their expertise to you, then the prerequisite for that individual can be waived.

Types of Objectives

Setting objectives helps to ensure all needed information is included in the training. It also tells you what will be measured to determine the effectiveness of that training. It also helps to communicate the potential value for the organization that approves your training program. Some trainers establish their objectives according to a specific model or criteria. Generally, objectives fall into one (or more than one) of the following categories.

Knowledge Objectives

Knowledge objectives relate to facts that a trainee can recall and apply at appropriate times. These would include such things as describing organizational charts, describing who their direct reports are, and in the case of trainers, who to submit their training proposal to for approval.

Skill Objectives

These are probably the easiest ones to identify. Skill objectives teach someone how to do something specific, and are either related to a physical task (such as turning on a computer) or a cognitive task (such as calculating the tax on a purchase).

Attitude Objectives

These objectives relate to awareness that will bring about changes in attitude. These objectives can be difficult to measure since they cannot be tested or demonstrated easily. They may also be difficult to write and take some practice, but they do get easier over time. Attitude objectives are common in new employee orientations (where the history and purpose of an organization are shared with new hires) and when diversity or motivation are the learning topics, for example.

KSA’s

These three categories are often referred to simply as KSA’s. Differentiating between the types of objective (whether it is a knowledge, skill, or attitude) does not mean that objectives are not mutually exclusive. Having the capacity to learn a skill objective generally assumes that the attitude already exists and that there is some background knowledge as well. For example, calculating tax on a purchase would require someone to have an applied knowledge of math skills, as well as an understanding of how important it is to perform work accurately to support the goals of the organization.

Setting the Scope

In order to decide whether a particular objective will be included in a training session, ask the following questions for each objective you plan to include.

- How many employees perform that particular task or function?
- How much time is devoted to performing the task or function?
- How critical is the task or function?
- How often is it performed?
- How difficult or complex is the task or function?
- In what ways could an employee's safety or success on the job be threatened if the task is not learned in this training session?

If a particular objective is aimed at only one or two employees and is not critical to the task(s) they perform, you may want to re-think including that objective in your program.

Writing Tips

Objectives need to be written in a way that is easy to understand and to the point. Apply specific action verbs so that participants and whoever evaluates your program can effectively assess the goals.

The following chart includes terms to avoid when crafting your objective statements because they tend to be vague and can be misinterpreted. If you use a term in the behavioral column when you are tempted to use a vague term, you will be better able to evaluate your results.

Desired Skill	**Vague Term**	**Behavioral Term**
Knowledge	Know, learn	Write, define, repeat, name, list
Comprehension	Understand, appreciate	Restate, discuss, describe, explain, review, translate
Application	Apply a thorough knowledge of	Operate, demonstrate, use
Synthesis	Establish creativity	Compose, propose, plan, design, manage, organize, prepare
Evaluation	Show good judgment	Evaluate, rate, select, estimate, measure

Verbs for Writing Clear, Concise Training Objectives

- Add
- Arrange
- Assemble
- Build
- Calculate
- Carry
- Choose
- Collect
- Color
- Compute
- Count
- Demonstrate
- Describe
- Distribute
- Draft
- Estimate
- Explain
- Identify
- Initiate
- Label
- List
- Rewrite
- Select
- Supervise
- Train

Objectives Exercise

Review the lists of verbs on the previous page. Then, select a task or function at your workplace that staff members need to learn in order to be successful in their job. (If you can't think of an example, choose one aspect of today's workshop.

Next, design three to five objective statements (at least one each of knowledge, skill, and attitude) that relate to that task.

Evaluation Strategies

Methods of Evaluation

Evaluating learning is a key component of any training program. We have included it following setting objectives because the two are closely related.

- A trainer must evaluate the learning in order to know whether the objectives have been met.
- You need to know what you want as an end result when writing objectives.
- Evaluation is essential to demonstrate that an organization is using their training resources appropriately.
- Trainees need to know that they will be able to transfer the learning back to their jobs effectively.
- A trainer needs to know if they have provided appropriate and meaningful experiences and material.

What information do you want?

To decide on your evaluation strategy, you need to know the reasons for evaluation. Do you want statistical information to report back to the organization? Do you want to know how you could improve your program? Will you use it to decide what kind of further training is wanted by the participants? Do you simply want a feedback form because there is no testing requirement? Or are you looking for some kind of combination?

Testing Attitudes

Adult learners who did not enjoy school or learning in general may be put off if they know they will be tested at the end of their training. Making the reasons for assessment clear at the beginning of the training is an important way to help them come to terms with any fear they may have about taking tests. In many cases, trainees will know they have to take a test for some courses and that they must achieve a minimum standard in order to pass (for example, with driver’s permits, first aid, or keyboarding speed). If you will be concluding training with testing, it is very important to let trainees know well in advance of the training. Highlighting the standards for passing in promotional materials and in confirmation of registration are both appropriate.

Four Levels

Many trainers use **Donald Kirkpatrick's four levels of evaluation**:

- **Reaction**: The way trainees react to training
- **Learning**: Knowledge, skills, and attitudes (KSA's) that trainees gain from the training
- **Behavior**: How the new KSA's are applied on the job
- **Results**: The impact that the change in KSA's have on the organization

A very thorough evaluation may include all four levels, measuring reaction, learning, behavior, and results. The fastest and most common evaluations focus on level one (**Reactions**). To really get an idea of the value of training to lead to change in the organization, however, all four levels may be appropriate.

Change at the **Results** level can often be the most difficult to measure. Training that is directed toward shifts in attitude and motivation, for example, can only be measured in a multi-faceted approach. For example, a sales company that provides teambuilding for its entire staff may choose to measure changes like number of closed sales and customer complaints as a demonstration of improved teamwork. However, it can take months or years to recognize that the changes were the result of training, and it may require input from trainers, supervisors, sales staff, organizational effectiveness studies, and the finance department.

Evaluation Methods

Some of the most common evaluation methods include:

- True-false questions
- Multiple choice
- Fill in the blank
- Short answer
- Essay questions
- Behavioral evaluation

True-False Questions

True-false questions verify recognition, not fact recall. They are easy to score, although the questions can be difficult to write. True-false questions take a black or white approach and are not helpful when you are dealing with exceptions or variables that fall into a gray area. In addition, there is a 50% statistical probability of scoring 50% on the test without even reading the material. One variation that can make for a more meaningful test is to add a component of "If false, explain," which moves the test into more of a short answer format.

Multiple Choice Questions

Multiple choice tests are easy to grade, since the trainee reads a statement or question and then selects the correct answer from a list of options. The answer sheets can be marked electronically (machine scored) or by hand relatively quickly. Multiple choices tests do require slightly more thinking than true-false questions, especially if the test is designed with options that are close to correct, with more than one correct answer in the list, or even no correct answers in the list.

Multiple choice questions can be difficult to create, so writing them takes some skill. Each question must be designed to present information clearly in order to test for knowledge, rather than encouraging the test-takers to guess or apply good test taking techniques. Common mistakes in multiple choice questions include leading test takers to the correct answer by using articles such as “a” or “an” or careless use of plurals.

Fill in the Blank

Fill in the blank tests require the test taker to recall information, as opposed to simply recognizing it in multiple choice or true-false questions.

In one sense, fill in the blank tests could be the easiest to write, since the material can be copied directly from the training materials (such as student manuals, slides, posters, or a speech) and then have a key word or phrase left out for the test taker to recall and insert. However, if your goal is to truly test for learning, fill in the blank statements must be carefully worded so that the words or sentences around the blank do not provide too many clues.

Short Answer

These questions are one of the most effective types to use in organizational training. They are often used when a trainee needs to learn to explain or apply a concept. They are an accurate method of evaluating a trainee’s knowledge.

Grading is more difficult for short answer questions than multiple choice, fill in the blank, or true or false questions. The trainer must pre-determine the expectation that will be met in an answer. A common method to measure short answer with a rubric, a structure used to compare answers with a benchmark. The rubric must include rules for scoring, and usually allows for partial marks to be granted for incomplete responses.

A sample rubric for a question about this workshop might look like this:

Question: Describe six essential elements of a training program.

Unacceptable (1)	One or two elements are described, with no supporting information
Needs Improvement (2)	Fewer than six elements are described. Training needs analysis is not among the answers.
Good (3)	Six elements are described. Each element meets the standards covered in training, including training needs analysis.
Excellent (4)	Six or more elements are described and all are technically correct. Answers include reflecting individual needs of the trainees.

Essay Questions

Essays are seldom used in organization training and are more common in education settings (such as school, college, or university). These questions must be very carefully developed in order for the learner to be able to craft an answer that reflects their mastery of the learning objectives. Essays take considerably longer to write and grade than other evaluation techniques.

Behavioral Evaluation

A written exam, like those described above, may demonstrate that a trainee understands the steps to completing a task and has acquired new knowledge. However, a behavioral evaluation requires the trainee to actually perform the skill and demonstrate that they can apply the knowledge they have gained.

These evaluations will require a detailed list of conditions under which the trainee will be measured and the acceptable standards. The evaluation might take place right at the end of training in the classroom, or may be required on-the-job at a later time in order to demonstrate the ability to perform in a real situation. Behavioral examinations may be arranged in a **simulation** if the testing would present a safety hazard.

Let's use a restaurant cook as an example. If the organization has developed a new dish and wants all their cooks to prepare it for a new menu, it would be reasonable to have the cook prepare several samples and have the final results evaluated by someone who actually gets to taste it (sounds like a great job!). On the other hand, if the trainee has learned how to do something that can only be demonstrated in a very dangerous situation (sweeping a minefield, for example), then a simulation is reasonable.

Points to Remember

No matter what evaluation format you determine is the most important, there are some additional considerations to keep in mind.

Scoring paper and pencil exams can be challenging at the best of times. However, when your trainees present with **learning disabilities, vision or hearing impairments**, **attention deficit, or are in the midst of learning a new language**, you need to get more creative to meet the needs of your trainees. Offering alternatives for assessment is important. Using point form in short answers, not expecting perfect spelling or grammar (unless it is a language course), and being open to suggestions from the trainees are all helpful strategies.

Most trainers offer an evaluation that measures the **process surrounding the training** (did the trainer do their job and meet the objectives). When you actually want to test for knowledge, then a test must be developed. Whether you develop a test that is administered at the end of training, or after the individual returns to work and tries the new skills for a short period of time, **developing knowledge tests is a specialty**.

If you are responsible for developing knowledge testing, you will also be responsible for learning and applying pedagogical principles of testing, which requires specific learning for the trainer.

Creative Evaluation Strategies

Many trainers are so focused on the content they have to include that the evaluation is left until the last 15 minutes of the entire workshop. They ask if there are any questions and have a form completed as people leave the room. After an interactive and compelling workshop, that evaluation method can seem impersonal and not at all educational to your trainees. Earlier in this program, we stressed that moderating the amount of content in your workshop is very important. If you can leave yourself more time in the evaluation phase, you can facilitate the transfer of learning from the workshop to the workplace while reinforcing the concepts that were covered.

The simple act of distributing the evaluation form early in the day allows trainees to formulate answers and comments, rather than trying to recall information at the end of the day when they may be tired or simply keen to get out of the door quickly.

Here are some other suggestions for wrapping up and evaluating training that are fun for your trainees, engaging for the trainer, and a little different than more standard methods.

Recommendations

A helpful way to measure trainee's reactions to the program, instead of asking, "Would you recommend this program to your coworkers?" might be to lead them in to a more thorough examination of their experiences. A sheet of paper with this question on the top can lead to answers that are difficult to summarize, and yet far more meaningful in content:

Imagine that a colleague (or your best friend) was thinking about attending this program the next time it is offered. "What were the top five benefits of the program?" you are asked. How will you respond? Please take the next ten minutes to write your response below.

Postcards

One technique that has been very successful is to have trainees complete a postcard before they leave for the day. On the back of the postcard, the trainee writes two or three goal statements that will draw on what they have learned during the training. For example, they may write:

"In the next thirty days, I will: genuinely compliment at least one of my co-workers every day, invite at least five people that I do not normally eat with to have lunch with me, and answer all questions from new staff cheerfully and professionally."

The participants address the postcard to themselves and return them to the trainer. About thirty days later, the trainer mails the postcards to the participants. Then they have an opportunity to review the goals that they set and see how well they achieved them.

Depending on how this activity is structured, trainees could complete the goals on a sheet of paper and slip it into an envelope. That will allow for the trainer to enclose a tip sheet on a topic related to the workshop, or an encouraging word or two about keeping on track with their goals.

Feedback Forms

A formal evaluation form will allow you to quickly tabulate your results and to effectively assess the value in the training. We will explore a useful template shortly.

Evaluation Tips

Make it anonymous.
You will get honest feedback if the trainees are not easily identified by the form. Forms that capture names or department, or that have some kind of number identification, will discourage trainees from providing you with useful feedback. You may have an optional section where trainees can be contacted for more information, if they wish.

Simple is best.
Extensive forms that get completed at the end of a program are often not completed fully. At the end of training, everyone is thinking about what they have to do next, and a long form or survey will not get their full attention. Keep your evaluation short, to the point, and only request information that you need answers to. If you format your questions to reflect the objectives that were identified at the beginning of training, then you will have information that you can easily use.

Keep it positive.
It is not necessary to include questions about things that you could improve in training. Generally, if people are unhappy about something, they will let you know either in person or in a comments section.

Encourage additional comments.
If you prefer to add one or two open ended questions to your form, you should do so at the end of the evaluation. These answers are more difficult to analyze statistically, but will give you more extensive feedback about any positive or negative aspects to the training.

Evaluating the Evaluation

Look at the sample form shown on the next page.

What do you like about it?

What do you not like about it?

Sample Feedback Form

Please rate your answers on a scale of 1 to 5, where 1 means that you strongly disagree with the statement, and 5 means that you enthusiastically agree with the statement.

1	**2**	**3**	**4**	**5**
Strongly disagree	**Somewhat disagree**	**Agree**	**Somewhat agree**	**Enthusiastically agree**

1. As a result of this seminar, I feel reasonably comfortable explaining the essential elements of a training program.

1	2	3	4	5

2. As a result of this seminar, I feel reasonably comfortable explaining the different approaches to training that are available.

1	2	3	4	5

3. As a result of this seminar, I understand the importance in preparing, researching, and delivering strong content.

1	2	3	4	5

4. As a result of this seminar, I have an understanding of how to design feedback and evaluation strategies for a program.

1	2	3	4	5

5. As a result of this seminar, I have a reasonable comfort level in creating a training proposal.

1	2	3	4	5

6. Would you recommend this course to a co-worker or colleague? Why or why not?

7. What did you think of the facility (cleanliness, temperature, chairs, and refreshments)?

8. Please make any additional comments or include additional feedback here.

If you would like us to follow up with you about the nature of your feedback, please provide your name and telephone number here.

Name Phone

Evaluations Exercise

Select two evaluation strategies or techniques that would help your trainer to confirm what you have learned and help you report back to your organization about the results of training so far. Outline the reasons why each would be a suitable choice.

Technique One

Technique Two

Defining Your Approach

Methodology

Approaches to Learning

Often the best teachers have a unique approach to teaching; engaging, motivating, and challenging students to learn. These were probably not the same teachers who stood in front of the class and lectured all day. In the same vein, students today, and adult learners among them, will expect more than a lecture when it comes to learning.

Although there may be times when a trainer must lecture, those times should be few and far between. Although lecturing may appear easier for the trainer, it really is not easier than other methods can be. Preparing a lecture requires research, writing, media preparation (slides, video, or audio), advance preparation, and a certain comfort level with being the center of attention.

One significant problem with lecturing is that it is not the way that most people prefer to learn. We learn best by doing. A **lecturette** (short lecture) can often be used as a way to introduce new information or complex content, but it must be supplemented by a change of pace and activity to keep participants engaged in the subject.

In designing activities, a trainer must consider the applicability of the chosen method. They should **always refer back to the objectives when deciding what to include**. If you use the same approach and methods repeatedly you may notice your trainees disengaging from learning. Their eyes glaze over, they yawn, they fidget, they leave the room to return phone calls – all things that trainers can lose sleep over. In addition, unless your methods are clearly connected to the objectives, adult learners may feel that you are wasting their time.

Key Methodologies

The list below contains **seven different methodologies** that you can draw from in your training. This is not an exhaustive list, but more of a sample to get you started thinking about different ways to approach your own training program planning.

- Demonstration
- Case Study
- Guided Teaching
- Study Group
- Role Play
- Games and Simulations
- E-Learning

Other Ingredients

You also need to consider a few more components of program design. Each training activity that you use must have **three main ingredients**:

- **Objective**: What is the expected learning from this particular activity?
- **Method**: This is the type of approach being used. Examples: role-play or case study.
- **Format**: How will you arrange the setting: indoors in a classroom, indoors in a laboratory, or outdoors in the woods? Will trainees be divided in pairs, small teams, or working individually?

Other Considerations

Once you have the main ingredients, then you can polish the material. (This is like taking a vanilla cake and adding spices and raisins to enhance the eating experience.)

Time	How many minutes will your activity take? Keep in mind that when we plan something we sometimes do not provide enough time for learning (or unlearning) to take place. When you are estimating the time, try to add some room for groups that may take longer, asking questions, or clarifying. Nothing can cause more frustration than an excellent activity that is rushed due to time constraints.
Engagement	What strategy will you use to get participants involved in the activity? Remember that although we do not advocate lecturing, some participants will be used to learning via lecture and may hesitate to accept learning in different ways. Other trainees will not participate fully if they do not see the point to the exercise.
Instructions	What specifically do you want participants to do?
Materials	What do you need in order to implement your design? Ensure that all materials are available and working prior to the lesson.
Space	Are there changes that need to be made to the environment in order to proceed with the design? One aspect that can catch a trainer off guard is working in a space where participants are not allowed to hang their flip chart paper on the wall for demonstration. Other problems can happen when tables are fixed to the floor and not moveable, or where there are no curtains to darken a room so that images displayed by a projector can be seen easily.
Debrief	The way that you conclude an activity can be just as important as the way it begins. What remarks or discussion do you wish to have before moving onto the next part of the program?

Five Tips for Top Notch Results

Reuse a good design.

When you have an excellent design, don't limit it to one workshop. You can often re-use your work and improve it. If you develop an excellent way to use case studies, for example, then continue to do so. Even the case studies themselves can be modified slightly and used in different situations rather than having to design them from scratch each time you need something new.

Research published designs that you can modify to suit your own training needs.

There are excellent resources available that have been tested and successfully applied in particular situations. Using those resources is recommended so that you keep in touch with what other trainers are doing to bring material alive, and so that you do not have to always design an entire program. Just be sure to quote or cite any resources that you use, or obtain permission where necessary. Usually, gaining permission does not take very long. The effort that you do put into it is well worth your time when you are able to use good quality materials.

Network and read.

There are many associations for trainers, coaches, speakers, and facilitators. There are also associations related to specific industries (such as IT, oil and gas, transportation, and agriculture). Keep yourself up to date and network with peers in other organizations so that you continue to bring fresh and interesting insights to your training program.

Mentor.

If the best way to learn something is to teach it, then as you gain experience with program development you will offer much richer learning experiences. While you are in the early learning phases you may find that you develop more quickly or effectively if you work with a mentor. In addition, take advantage of opportunities to mentor new trainers to enhance your own capabilities.

Use experts.

A training program does not have to rely on the same trainers over and over. Most trainers do well in certain areas, but are not experts in every subject. Bringing subject experts into your program can really enrich the experience for trainees, and also offers your trainers a chance to observe subject matter experts in action.

One caution here: you will need to ensure that the experts you bring are also capable trainers or facilitators. An expert with poor presentation skills or terrible speaking skills can spoil your whole program. Some experts work through a bureau where you can review a video, or you could invite yourself to a presentation to see them in person.

Approaches to Learning: A Lesson in Itself

Instructions

1. You will receive a handout describing a training project.
2. Review the different training methods described in the Background Information section.
3. Working with your group, try to come to consensus on the three best methodologies that would be appropriate for your assignment.
4. As you confirm your three methods, list the pros and cons of each one, as well as any special considerations for each method that you agreed upon.
5. Identify the most suitable format, materials, and setting that your choices would require.
6. There is space to record all of this information in the workbook.
7. At the end of the working period, the small groups will present their results to the larger group in a way that involves all members of the group in the presentation.
8. If you need more information than what is contained on your handout, go ahead and get creative (make it up!).

Background Information

Demonstration

Taking participants through an experience as it actually unfolds adds another element to training. If they can see, touch, feel, or smell then they become involved in the activity, rather than simply watching. Talking about applying a paint finish to a piece of oak is not nearly as effective as demonstrating the process. Allowing the trainee time to practice and then demonstrating their new skill back to the trainer makes lots of sense!

Another demonstration technique to master is a form of *questioning*. If you have a lot of content to bring to a training class but prefer not to lecture, you can use questioning as a demonstration of the concepts. For example, in a course about working in a multi-generational workplace, asking participants a series of questions can provide a meaningful demonstration of how workplace values shape communication.

Example questions:

- How does the company assign mentors to new staff?
- How were the last successes celebrated among the staff?
- In what ways does the organization celebrate diversity?
- Does the organization offer alternative work arrangements to the usual 9:00-5:00 work day?

In setting up a demonstration, always consider the objective that you are going to highlight. Choose a concept or procedure that can be demonstrated. For example:

- A purchase order procedure
- A safe vehicle walk around procedure
- A cleaning procedure
- A document handling procedure

Here are some possible methods for your demonstration:

- Trainer demonstrates to the group
- Participants demonstrate to the group
- Trainer creates index cards with individual steps, gives them to participants, and has participants arrange themselves in the correct sequence

Case Study

Case studies are useful in several ways. You can take actual workplace events, remove the identifying information, and then use the examples in your training. This makes a meaningful learning tool for trainees. You can also include information in the case study that might normally be provided in a lecture. When you write a case study, whether drawing from actual examples or creating a situation that fits the training objectives, you can present abstract information in a concrete manner.

Case studies are a helpful way to share techniques and approaches involving the results of one-on-one or group interactions, such as counseling, coaching, listening, or interviewing.

Finding a case study can be difficult. Asking for examples from within the organization can be very helpful, or you may decide that the best approach is to create one that is focused on the training program.

If you write your own case studies, here are some guidelines:

- Identify the objective (issues, concepts, or principles) that you want to cover.
- Provide yourself the space and time to brainstorm scenarios that illustrate the point.
- Narrow down your list to the most promising scenario, and develop the events, characters, and situation.
- Write your first draft and then read it to yourself out loud to gauge the flow and overall mood of the case.
- Rewrite the case study.
- Ask a colleague or friend to read the case study and give you feedback about their interest level and clarity of the language that you selected.
- Rewrite the case study.
- Develop discussion questions and any supporting information that may help the trainees (such as charts, photos, or video clips).

You can also have your participants write their own case studies and then present them to the remainder of the group. Be sure to allow ample writing and practice time if you select this option, and limit the size of the case study to respect the time that you have available. Somewhere between 100 and 200 words is often sufficient.

If you do prepare for some longer assignments like this in your workshop, it can be helpful to place it right before a break (lunch, coffee, or end of day in multi-day workshops) so that participants who finish early have somewhere to move off to and people who finish slower do not feel so rushed.

Guided Teaching

This method can be particularly helpful when you have not had an opportunity to contact trainees before a workshop, or do not know them well. Guided teaching asks a series of questions to assess the group's background in the subject. It can also be used to get their thoughts or conclusions on a subject. If you record their answers and comments and then compare them to the learning objectives in your notes, then you only need to bring the missing information into your lesson. This method also encourages self-discovery, which is a great way to help participants realize that they know more than they thought they did.

Guided teaching is best achieved by asking open ended questions and questions with several possible answers to the group to stimulate their thinking. Give participants time to analyze their answers in pairs or small groups, and then have them look through all of the answers for common elements that point to some answers grouping together. From the grouped answers, have the participants develop a statement or two that reflects their meaning. Then, present the objectives that you wanted to teach. Have the participants determine how their responses fit within the objectives. If there are points that add to your instructional design, make sure that you record them for your future use.

Guided teaching can be applied for seemingly complex or ambiguous concepts. For example, let's say that several companies have invited you to present a workshop on innovative recruiting. You have not met the participants before, but you know that they work for a parent company that operates within several different industries.

Questions that will get them thinking and give you an idea of their knowledge about the subject could include:

- What effective methods are you using to recruit new staff currently?
- Are you using ineffective recruiting methods? If so, what are they?
- How many recruiting methods have you tried in the past two years?
- Where do most of the people that you would like to hire get their education?
- Where do most of the people that you would like to hire hang out in their spare time?
- Can you list the attractive areas of your company's pay and benefits package?
- What efforts does your organization make to provide education or training to their staff?
- What are the key components of your health, safety, and wellness programs?
- What is the turnover like in your company? In your industry? In the region(s) where you have staff?

Study Group

A study group can be a good way to introduce new material without lecturing. It also requires participants to work together and get to know each other (or at least get to know what is important to them). Participants are provided with well-designed handouts of lecture material (including text, diagrams, charts, etc.) and then arranged in small groups to clarify the concepts. The results are best if the material is of a moderate difficulty or open to wide interpretation.

Structure from the trainer is needed to provide focus to the exercise. You will also need to ensure that the groups receive input from each member, since some participants hesitate at adding their voices to this format of group conversation.

Study groups work well with the following guidelines:

- Instruct the groups to read the material quietly initially, and wait for their group to finish reading before tackling the questions.
- Following the reading, participants are to study and analyze the material carefully. You may wish to have them:
    - Clarify the contents
    - Create examples, illustrations, or applications that explain the ideas
    - Identify elements that are unclear or confusing, or that they disagree with
    - Identify questions or aspects of further study that are needed
    - Debate an opposing point of view
- In reviewing the purpose of the exercise, you may wish to have the small groups share their findings with all participants, obtain their questions so that you can direct them to further information, or provide them with a quiz or application exercise where they can assess their understanding of the material.

Role Play

Role play is a popular method of learning for trainers and trainees. It is a helpful way for participants to experience certain feelings and practice their skills in a non-threatening environment. Participants may object to participating in role plays if they feel that they are being judged on their performance. The trainer's role is to ensure that participants feel comfortable with the experience, which, as always, is helped along when participants understand the reason for the exercise.

Role play is ideal when you want to include dramatic, energetic, or awkward content since the participants (or actors) can pretend to be someone else rather than being themselves.

One advantage of role playing relates to feedback, a key learning tool. Feedback can be provided by peers using a set evaluation, by the role player using a self-assessment, observations from the trainer, or open discussion from the group. In any case, the purpose of the discussion is to review the performance in terms of meeting the objectives and offering suggestions for improvement rather than judging the quality of the acting.

Role plays may be scripted so that the roles and situation are clearly conveyed to the audience, or they may be completely improvised. A balance of both can be helpful if participants have difficulty creating their own details or with being encouraged to act spontaneously, and when the trainer is looking to include certain common elements or teaching points to the scenario. Roles can be pre-determined or they can be re-enactments that are prepared by the participants.

Skill development is a common application of role play. The trainer may demonstrate the skill, and then ask participants to do it themselves. The role play can also provide ample practice to develop confidence and comfort with the skill, as well as a chance to receive feedback throughout the practice period and improve the results.

Games and Simulations

Games and simulations can be enjoyable and effective ways to enhance the learning experience for participants. They are also a way to inject some energy and humor into the training session or demonstrate a key instructional concept.

Some trainers may hesitate to use games in their programs, especially if they are not comfortable with them. Games and simulations should always reflect an objective.

A trainer that knows their material well can get participants involved and actively participating. When games seemed forced or contrived, the participants will recognize the problem, so they do carry a risk. At the same time, games and simulations can also be used to challenge participants safely and get them thinking about their own attitudes and values.

Developing games and simulations can be a huge task, because in addition to the components already listed, they also need to be engaging, meaningful, fit within time frames, and reflect defined training objectives. There are many excellent resources available in books or on CD that have games and simulation exercises designed for a variety of goals. These games can be adapted to reflect the size, setting, and objectives of your group. Always make sure to get the proper permissions when modifying games.

You can also modify well-known games. Many trainers have adapted versions of the television game shows Jeopardy or Wheel of Fortune. Board games can also be adapted depending on what you need; for example, giant versions of Scrabble can lead to additional learning and much laughter.

Any game or simulation that you select needs to follow these guidelines:

- It must be relevant to the participants. Just because there is a game that you love that worked with a group last month does not mean it will work for every group. Select carefully.
- Instructions must be carefully thought out. People are able to follow directions that are clear and simple, but sometimes the point is to provide complexity and see what the results are. Ensure that whatever your instructions are, you consider them carefully. If you are conducting a session in a hotel conference room and send your participants out in the hallways blindfolded and asking strangers for directions, the results could be quite unexpected.
- Games and simulations need to be debriefed, just as other exercises do, in order to ensure that the experience is a learning one.

E-Learning

For organizations that have multiple sites or individuals wanting to learn while at home, e-learning is a viable option. Although some e-learning options can be very complex and costly to set up, other options are quite reasonable. If you need to bring trainees together over long distances or want to have people work at their own pace, there are now trainers who specialize in electronic learning methods. Consider the capacity to communicate via video streaming, video conferencing, specially designed Internet applications, and telephone.

Podcasts, where an instructor records their presentation and students download an audio over the Internet, are another way to connect with trainees. With software being more readily available, trainees can also record a podcast to send back to the trainer.

Wikis provide the opportunity set up a course electronically where trainees can post responses to readings and ask questions of a facilitator or others taking the same course. They also provide the opportunity to follow a discussion over a set period of time, and a means to submit homework assignments and provide different approaches to feedback.

E-learning can be a component of a more traditional workshop style, or it can provide the entire learning experience. From an instructional design point of view, it is more difficult to develop aspects of team building, counseling or coaching, and other soft skills in this format, but it has been successfully done and will continue to evolve as technology, participants, and trainers develop. Computer training, science and math related concepts, and training in procedures or processes, are readily being adapted to e-learning formats.

The main problem with e-learning is that it is not for everyone. Successfully completing a course that is presented electronically takes discipline and motivation. It is not as well suited to adults who learn best in a person to person exchange of ideas and concepts (which a more traditional approach offers).

In some cases the rates of non-completion for e-learning courses has been reported to be as high as 70%. However, when the trainee can sustain motivation and persistence independently (or perhaps with added reinforcement from the employer or a professional association), successful completion rates will increase accordingly.

Another major factor in e-learning success has to do with instructional system design. If you are approached by a developer who promises to translate your current workshops to an e-learning platform and gets it done in no time at all, chances are they are computer designers, but not instructional designers. In order to change the learning format, there has to be consideration given to how adults learn, and the best way to modify the delivery methods and still meet the intended objectives. The training platform must be designed to reflect the learning styles and needs of trainees.
Currently, there are some different training platforms available, but most of them require that the training materials be modified to fit the software design, rather than developing software that is adapted to the instructional design. This means that the most common approach seems to take current materials, transfer them to an HTML or PowerPoint format, and call the result an e-course. If we continue to subscribe to courses developed in that manner, the withdrawal and failure rates for e-learning approaches are not likely to change much.

Our Methods

Project: ____

Method One: ____

Pros

____

____

____

____

____

____

Cons

Considerations

Materials

Format

Setting

HR Consultant

Method Two: ____

Pros

Cons

Considerations

Materials

Format

Setting

Method Three: ____

Pros

Cons

Considerations

Materials

Format

Setting

Researching and Developing Content

Researching Content

So far, we have reviewed several of the essential components of a training program. Now we will focus on the actual content, the information that will be presented during training.

The content being delivered stems directly from the training objectives that are set. It will be influenced by several factors, such as the trainees' motivation to attend training (was it their own idea or a mandatory course?), their learning style, and the trainer's preferred training style, as well as factors such as available resources, time available, and the trainer's skill level.

If you are designing a brand new program, then there are several ways that you can research and develop your content.

Remember to keep the quantity of content at a moderate level. If participants feel rushed or overwhelmed by content, they will not actually learn the information that you are presenting. Focus on the objectives that you have designed, and try to keep a common theme running through the course.

Use appropriate resources. If you are developing a technical course, then there will likely be instruction manuals, procedures, and processes for you to draw from. The reference material that you use must be up to date according to the equipment. If you are facilitating a course in a software program, keeping current is essential.

If you are developing a more theoretical course, say something in the human resources area, then you will have to carefully review sources that you use. Fads and trends that you are not familiar with can derail your training efforts. People do not want to attend training and receive the "flavor of the day" that they perceive will change next year (or next season) and require that they come back for more of the same training.

Last but not least, participants need **information that they can apply**, so your program must also help them to transfer what they learn into the work environment.

Content Considerations

Where do you go for information?

How do you clarify what information is relevant?

What questions do you ask to identify information that is not practical or outdated or a part of a fad? (These are important, since they will also help you to find out what is cutting edge, new, or being developed.)

What coaching would you provide to new trainers to ensure that they were able to locate the exact information that they needed?

Pre-Assignments in Training

What is the purpose of including a pre-assignment?

What alternative forms of pre-assignments are available to trainers?

How can we ensure that participants complete their pre-assignment prior to the workshop?

Choosing Openings and Energizers

Getting Started

The opening to any training program sets the stage for the experience. Getting participants actively engaged, buying into the material, and learning to follow instructions, is best done by giving them a chance to greet the other participants, helping them to relax, and encouraging them to fully take part in the day.

Good trainers understand how to use **body language**, **tone**, and **pacing** to connect to their participants. Once the connection has been established, the trainer often uses a carefully planned activity to build interest and encourage participants to buy into the subject matter.

To get things going, select a game or activity that dramatically demonstrates the main points of the workshop. In addition to the activity, you may choose to:

- Include work related anecdotes, cartoons, or graphics that help to focus attention on the subject matter
- Present a problem that will be discussed throughout the training
- Ask participants questions related to the topic (even if they are new to it) to give them clues to listen for throughout the day
- Give hints or foreshadowing in an enthusiastic or mysterious manner to build interest and participation

The Value of Games

Games are a great way to help people relax and lose inhibitions about joining discussions, asking questions, and participating in role plays. Doing it right, however, takes some skill and careful planning on the part of a facilitator. Often there are participants in a workshop who may not feel comfortable playing games, or who do not like the idea of playing games. A good program is designed to respect the needs of all participants, to encourage them to feel comfortable with taking some risk, and to be flexible enough to allow them to take part only to the extent that they are comfortable.

Types of Games

Not every game will work with every group. Knowing your audience will help you select the right activities. There are different types of games and activities that serve different purposes.

An **energizer** is meant to increase the energy within the group and a room. Energizers are great in that post-lunch, getting drowsy period.

Icebreakers are designed to help people connect to each other and the training objectives. They get people interacting with each other and make people more receptive to learning. Icebreakers should also lead into the topic material.

There are also more **formal games** that allow teams or individuals to enter into some kind of competition. Care in setting up competitive games is important so that no participants feel inferior or turned off from training. It really depends on the value that you are looking for in your session, and the learning objectives.

Late in the day when people are becoming tired or restless may not be the best time for a really active game, but it is always helpful to have a few extra energizers or **stretches** in mind to keep people engaged and interested in the program.

Tips for Success

A game that falls flat can spoil an entire training day, so it is important that the facilitator consider the following tips.

First and foremost, **don't select activities that would annoy you** if you were a participant. Try them out with your family or children first.

As well, make sure that you **adjust the length and type of game** to suit the length of the session. A one-day workshop probably does not benefit from a 45 minute game; a two to five minute icebreaker is probably just fine. However, if your group is taking part in a multi-day workshop and would benefit from getting to know one another really well, then an extensive game of up to an hour is appropriate.

Always **know your audience**. You could develop a short quiz for the participants to complete anonymously before training to assess their comfort level, how well they know other participants, and so on. You could also speak with their managers or former trainers.

Generally speaking, more senior staff will not be willing to look silly or foolish in front of their own subordinates. Junior staff may not be comfortable looking silly in front of their boss. In addition, if participants arrive in business clothes, they may not be comfortable with really active games.

The content of the workshop needs to be a consideration, too. If you are providing introductions and icebreakers for a day consisting of meetings or sessions about layoffs, downsizing, or change, you will need to select your games accordingly.

Learning that deals with "soft skill" subjects such as communication or team building will **benefit from games** more than one that focuses on learning computer software, for example. The software group, however, might really need some kind of energizer as an energy infuser at some point, or even several times, during the day.

People who know each other very well will find some exercises **redundant**. If the group knows each other well, you need to be more selective in the games that you choose. If you are facilitating for people from different organizations, then they will benefit from getting to know each other better.

Training Instruments, Assessments, and Tools

When considering resources that will support training objectives and provide meaningful content, there are a wide variety of training instruments, assessments, and tools available. Some industries also have a tendency to rely on certain tools and trainers are expected to understand the tools and language (such as abbreviations) attached to them.

What training tools are you familiar with?

What are the pros of these tools?

What are the cons?

Creating Supporting Materials

When writing a training program, you will typically compile your notes to help guide you through the day. Other materials that you want to prepare may include student guides, PowerPoint slides, and handouts.

Student Guides

Having a student workbook (like the one provided with this program) that the students can follow along in, write information in, and use as a resource later on, can be valuable.

Some points to remember:

- Make sure to include reference pages for the student workbook in your instructor guide.
- Leave some information out of the guide (i.e., include places for them to fill in information).
- Make sure you don't spend the training session reading to participants.

Handouts

Many instructors use handouts to highlight particular points and to provide students with a post-workshop reference. Handouts are much easier for the student to digest and are often easier to produce than an entire student guide.

Some points to remember:

- Make sure your handouts are well-written, easy to read, and professional looking. Photocopies of handwritten notes will not impress anyone.
- Make sure you make enough copies for everyone.
- You may want to include fill-in-the-blank questions or other spaces to write.
- If you have many handouts, you may want to bind them together to help you (and participants) stay organized.

Electronic Slides

When done properly, electronic slides can help you keep participants engaged. However, there is the risk of "Power Pointlessness," where participants feel like they are being taught by the presentation.

To avoid this, try these tips.

- Include only key points on your slide, such as discussion questions or topic points. Use these points as a launch pad for your lecture or discussion.
- If you want participants to focus on something other than the presentation, press the B or the W key on your keyboard to change the slides to a solid black or white screen. Press the key again to return to your presentation.
- Make use of built-in themes to keep your presentation consistent. You want participants to focus on the content, not flashy animations or colors.
- Most presentation programs allow you to print slide notes for students to follow along with.
- Make sure slides are readable.
- Ensure that the slides match your notes and supporting material.
- Practice beforehand.

And to avoid a fiasco, remember to test your equipment and bring a backup plan.

Testing the Program

When you are responsible for program development, another important factor is to actually test the entire program. This is an aspect of evaluation that we discussed earlier, but it is also important enough to stand on its own.

A program can be more easily promoted when there are results available to the curious or wary. A tested program is one that meets the stated objectives, proving that the instructional design is appropriate.

Can you name some programs, products, or inventions that are tested?

What are the advantages and disadvantages to testing?

What are some ways that training could be tested?

Creating Proposals

Organizing Your Proposal

Introduction

The purpose of a proposal is to persuade and inspire the reader to take action. A successful proposal does that by connecting to the values of the organization.

There is no simple formula or secret to writing a successful proposal. Government proposals are normally long and based on very specific criteria. Corporate proposals are generally much shorter (unless you work for the government of course!), but in either case your proposal can be eliminated if it does not comply with the rules that either organization has established for proposals, or if you do not present a compelling case.

Fundamentals for Writing Internal Proposals

Know your audience.
Proposal writing must be concise and focused. In order to write that way, you must know your audience. There may be several levels of management that will review your proposal. Remember that you are not writing for each of those individuals, but rather for the organization. This means that you must reflect the values and strategic vision of the organization, not the individuals.

Research and rapport.
Crafting your proposal is just one part of actually obtaining an approval. In an ideal case, you will have already established a rapport with your executive and have provided them with meaningful information from your initial training needs analysis (TNA) and the work that went into that. Then those individuals are not going to be surprised to see a proposal from you.

Your reputation is built on the quality of your work, so your executive should be ready and waiting to receive your proposal, interested in what you are presenting, and even keenly waiting for it. The proposal can actually stand alone as a summary to the conversations that you have had, when approval is almost guaranteed and your proposal is a follow-up mechanism.

Be clear on your goals.
The way that you state your understanding of how the training meets the needs of the organization and strengthens its position in the industry or marketplace can strengthen your appeal. Consider your key message, and present it clearly and concisely.

You can do this by:

- Introducing what issues will be resolved and what impact this has on the organization.
- Proving that the issue exists through relevant statistics, studies, etc. Anecdotal reports are not sufficient.
- Including a budget that details exactly how much money, time, and additional resources are needed to develop and roll out the training program, and within what time frame. Do not fudge any numbers.
- Describing the goals of the program clearly, including the proposed objectives, methodology, and format that you plan to utilize.
- Detailing realistic, measured objectives. What exactly do you want to do and what are the anticipated outcomes if you receive approval? For example, how many more clients do you hope to serve per year, and how will this increased capacity impact the organization overall?

Craft a compelling 'Ask.'

This section is where your persuasion skills are called on. Word this in a way that the reader not only knows exactly what they need. (Notice this is not exactly what you want; the proposal outlines benefits to the organization, not benefits to the program designer.) Include a brief outline of the negative impact of not approving or supporting the program.

Make it or break it: the executive summary.

We mentioned earlier that a proposal written for an organization should really be a summary of conversations that you have already had. Depending on the makeup of the organization or the speed with which the training must be undertaken, it is possible that you may not have had all the conversations you need with the right people. What if the plan is extensive and has to be sent, for example, to an international committee for approval? This is where the make it or break it section of your proposal comes it; the Executive Summary.

An executive summary is NOT an abstract (or summary) of your proposal. It is a clear, concise piece of your best writing. It is written before the rest of the proposal to ensure that the rest of the information supports what is contained in the executive summary. The executive summary is written using language and style directed toward the executive with the authority to approve your proposal. It does not contain technical jargon or abbreviations. Its focus is to substantiate the benefits of the proposal to the reader.

The goal of the executive summary is to convince the executive reader that this program is exactly what the company needs and wants. The executive summary is a very persuasive piece of writing that describes three to five strong characteristics of the program (known as the *unique selling proposition or USP*) and a call to action.

An executive summary is normally no more than 12% of the size of your entire proposal.

Executive Summaries vs. Abstracts

In a corporate proposal like this, an abstract is not normally necessary (although it depends on the size of your proposal). An abstract is a summary of the main points of the proposal. Its intent is to stimulate the reader to jump in and read the entire proposal. Its intent and purpose are distinctly different from an executive summary.

Training Proposal Checklist

A training proposal should have each of these elements.

Name of training program	
Compelling and persuasive executive summary	
Subject	
Training need justification (needs assessment, grant requirements, licensing requirements)	
Target audience(s)	
Learning objectives	
Learning outcomes	
Instructional design	
Methodology	
Format	
Time (hours)	
Duration (when offered)	
Dates (if applicable)	
Continuing education credits	
Authorizations required (program level, division level, board level)	
Research and rapport completed	
Goals clearly stated	
Budget	
Other	

Proposal for a Training Program

Case Study

Your company is going through significant growth as a construction company working mainly in the commercial sector. There is also increased demand for projects in the residential renovation area. The developer has completed a needs assessment and determined that team leaders and supervisors are routinely promoted through the organization when they demonstrate good technical skills and are natural leaders, but most of them have never had any formal leadership or management training. Although the company has been very successful in its thirty years in business, they are now having problems attracting and retaining staff. Supervisors and middle managers have documented increasing absenteeism, staff quarrelling, and even physical fights. The executive wants the developer to propose a program that will solve their problems.

Framework

Name of Training Program

Compelling and Persuasive Executive Summary

Subject

Training Need Justification

Target Audience(s)

Learning Objectives

Learning Outcomes

Instructional Design

Methodology

Format

Duration, Time, and Dates

Continuing Education Credits

Authorizations required (program level, division level, board level)

Research and Rapport Completed

Goals Clearly Stated

Budget

Other

Building Rapport

To build rapport with company sponsors, you need to ask some focused questions to find out more information about the proposed training. This should take place early in the proposal development to help you flesh out the proposal's framework.

In order to get the best information you can during the interview, the following guidelines will help.

- Each question must be open ended in order to uncover what the organization's goals are for this training. Open ended questions will also encourage conversation and help you to get at the underlying priorities for the program.
- Avoid compound questions (two questions in one).
- Keep questions straightforward so that you can take good notes and obtain the information that you need.
- Explore whether the goal of the training program is to provide a one-time fix or has the potential to become part of a broader strategy to provide ongoing learning and development opportunities for the staff.
- Explore openness to incorporate non-traditional methods (i.e. training that takes place outside of a classroom or corporate setting).
- Following the meeting, send the executive that you interviewed an e-mail or memo that thanks them for the meeting, and includes bullet points of the highlights of your discussion.

Formulate a list of seven to ten key questions that you could ask an executive to find out more information about proposed training.

Pulling it all Together

Action Plan

___________________'s Action Plan for developing an amazing training program
(Write your name here)

Outline the most important aspects of this seminar that you can implement in your work right away. (These are your goals.) There must be at least three and no more than five. If you can write them in a compelling way, then you will find yourself moving toward them in no time!

Identify a member of your group that has agreed to help you follow up on your goals and help keep you on track. Write their e-mail or phone number down too, so that you can easily call them and let them know about your action plan, and see how they are making progress on their own plan.

_______________________________ _____________
Sign here as your commitment to your plan **Today's Date**

Your first review date of this plan ________________________ (14 days from now)

Your second review date _______________________ (30 days from now)

Completion date ____________________________

Further Reading:

- ✓ Auerback, Carol, and Mel Silberman. *Active Training.* Pfeiffer, 2006.
- ✓ Bens, Ingrid. *Facilitating with Ease.* Jossey-Bass, 2005.
- ✓ Charney, Cy, and Kathy Conway. *The Trainer's Tool Kit.* AMACOM, 2005.
- ✓ Forsyth, Patrick. *Improve Your Coaching and Training Skills.* Kogan Page, 2008.
- ✓ Keeps, Erica J., and Harold D. Stolovitch. *Telling Ain't Training.* ASTD Press, 2011.
- ✓ Lawson, Karen. *The Trainer's Handbook.* Pfeiffer, 2008.
- ✓ Leigh, David. *The Group Trainer's Handbook (Third Edition).* Kogan Page, 2006.
- ✓ Rothwell, William J. *Adult Learning Basics.* ASTD Press, 2008.
- ✓ Thiagarajan, Sivasailam. *Thiagi's 100 Favorite Games.* Pfeiffer, 2006.
- ✓ Vaughn, Robert H. *The Professional Trainer: A Comprehensive Guide to Planning, Delivering, and Evaluating Training Programs.* Berrett-Koehler, 2005.
- ✓ Wildermuth, Cris. *Diversity Training.* American Society for Training and Development, 2005.