



Section 1: An Approach To Successful Training

Overview

A process-oriented, phased approach to training ensures success because it facilitates the division of labor among training team members, gives structure and organization to a complex, mission-essential task, and provides a mechanism for managing the myriad of logistical details inherent with knowledge transfer in a dynamic training environment. This approach can be broken into five major steps: Accept & Analyze, Plan & Prepare, Conduct, Assess & Evaluate, and Report. See Figure 1: Five Steps to Successful Training below.

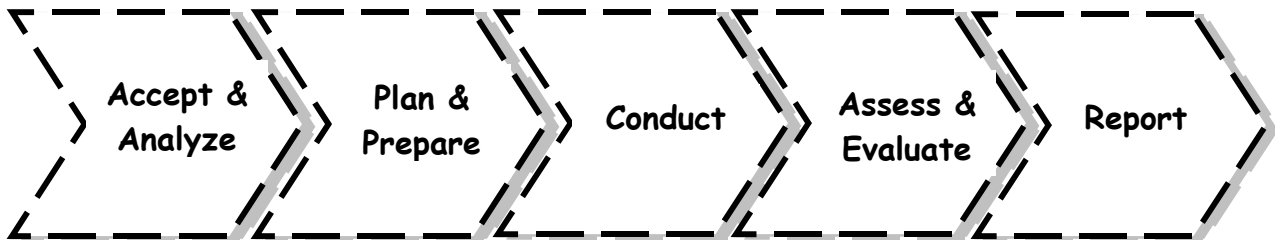


Figure 1: Five Steps to Successful Training

Accept & Analyze

The Accept & Analyze step begins as soon as an individual(s) accepts or acknowledges responsibility to plan and conduct a training event. It ends only when it is determined that the subject training is feasible, suitable and acceptable. Analysis of the five W's (Who, What, Where, When, and Why) provides the answer to whether the training is feasible, suitable, and acceptable.

Plan & Prepare

Planning and preparing are an essential component of successful training because those activities make the training possible. Planning involves developing checklists of all the tasks that must be completed prior to conducting the training. For example, locating facilities, loading software, printing training manuals, and checking IDs and passwords. Preparation entails performing all the tasks or activities on the checklist prior to training.

Conduct

Delivery of the training is the major and the most important task within this step. The previous steps are the foundation to the big event – Execution. Execution is everything! How well your class goes is highly dependent on how well you present the information and communicate feedback. It also depends on how well you handle various situations that may occur during the training. Tips and techniques are available to aid in your execution.

Assess & Evaluate

Assessment of student performance assists the instructor in determining whether the training objectives are being learned. Assessment occurs throughout the training through practical and review exercises. Exercises also assist in building student self-confidence in performing the given tasks. Conversely, evaluation is a tool to assist the instructor in determining how well the training went overall. Evaluation is used to pinpoint areas of strength and areas of improvement. It also serves as the mechanism for instructors to gauge his/her performance.

Report

A formal written report is a professional way for the instructor to inform his/her management of the training results. It usually includes a summary of the training conducted (who, what, where, when, when and why), the instructor's commentary about the event, the overall assessment results, and the consolidated evaluation results. Any additional information management may want can be added to the report.



Section 2: Accept and Analyze

How many times have you been to a training class that you perceived as irrelevant? The instructor didn't do his/her homework. Understanding your audience and why they are being trained establishes relevance and engages your learners.

Accept

Acceptance of the training task happens when the individual(s) acknowledges that he/she has a specified task to train. The sooner the task is accepted the more time there is to prepare for the event. Preparation begins with a quick analysis of the training requirements, as you cannot properly prepare without answering some basic questions.

Analyze

Now that you have accepted the training task, you need to ask five (5) basic questions: Who, What, When, Where and Why. ("How" comes in the next phase.) Gaining a clear and precise understanding of the situation will assist you in planning and preparing for the training event.

- 1) **Who are you training?**
 - a) How many students?
 - b) Personnel local or is travel involved?
 - c) What is the amount of knowledge and skills in the subject matter?
 - d) Determine a reasonable common denominator (e.g., audience is mainly scientists,)
 - e) Prerequisite technical knowledge or computer skills?
 - f) Any known special requirements or physical challenges?
- 2) **What are you training?**
 - a) What is the topic or subject matter?
 - b) What is the method of delivery?
 - c) What basic materials and facilities are required?
- 3) **Why are you training?**
 - a) What is the purpose, aim or goal of this training?
 - b) Why this particular audience?
 - c) Why this particular time?
- 4) **Where should you hold training?**
 - a) Is there a primary and alternate training facility available to accommodate the audience?
 - b) If participants are traveling to an off-site location for training, is the facility centrally located at a convenient transportation hub training facility?
- 5) **When can you schedule training?**
 - a) Is there an established date when training must commence or be completed?
 - b) How many estimated hours of training are necessary for the topic?
 - c) Are there any known limits to the number of hours available for training?

Once you have answered those questions, you must determine if the training is feasible, suitable and acceptable. Feasible refers to whether the training event, given the resources available, can be accomplished. Suitable focuses on whether the training will meet the goal or objective. Finally, acceptable asks, "Is it sensible to use critical or valuable resources to accomplish the training task?" (Note: You should probably discuss the acceptable answer with management.) If the training is determined to be feasible, suitable, and acceptable, you now begin to plan and prepare for the event.



Section 3: Plan and Prepare

“My password isn’t working. I can’t log on.”
“Could you please adjust the temperature; it’s cold in here.”
“What number can I give to my boss so that she can contact me?”
“Is there a designated smoking area?”

Plan

Planning involves identifying all the tasks and subtasks that must be accomplished prior to the training event in order for it to be successful. Identifying a detailed list of all the elements that affect the training event and then addressing all those items ensures focus will be placed on the training and not outside elements. Some of major areas include:

- Equipment (e.g., computers – hardware and software, projectors and screens, whiteboards, flip charts,
- Facilities (e.g., access, hours, parking, restrooms, phones and faxes, messages, break room, thermostat)
- Points of Contact (e.g., facility, students, Information Technology support, application support,)
- Classroom Decorum (e.g., cell phones and pagers, food and beverages, computer usage for email and Internet)
- Training Materials (e.g., appropriate, availability, printing, transport or shipping to facility,)

Checklists for these major areas have been developed for you to use in preparation for the training event. They are located in Enclosure 1: Checklists. The enclosure includes many tasks some of which may not apply to the given situation. In that case, ignore the tasks that do not apply. As many documents, the checklists are a living document intended to be added to and modified as necessary to make them more useful.

Prepare

To prepare for the training event, there are three main areas you need to focus on: Facility, Audience, and Yourself. (See Figure 2: Three Areas in Preparation Step.) Facility preparation entails executing the tasks on your checklists and fostering cooperation with all parties involved. The checklists that apply to this area are Facilities, Hardware/Software, and Logistics. In preparing your audience or the participants, you should contact them (via email, phone, fax) to finalize the dates and provide any pre-training materials (e.g., agendas, pretests, directions to facility,). Last but not least is preparing yourself. Review the training materials, determine your training strategy, and rehearse. The more comfortable you are with your presentation; the more confident you will be.

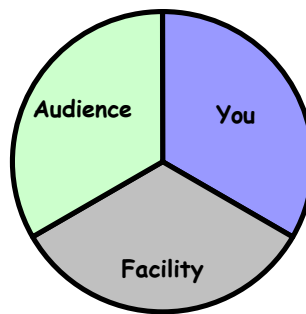


Figure 2: Three Areas in Preparation Step



Section 4: Conduct

It's Showtime!

Execution is everything.

"Good teaching is one-fourth preparation and three-fourths pure theatre." -Gail Godwin

All the analysis, planning, and preparation you have done in the previous steps has been leading up to the big event – the training. If you have analyzed the situation well, applied that analysis to your planning and preparation, you are almost ready. Now, all you need is to hone your presentation and communication skills, and exercise some tips and techniques to manage your classroom.

Instructor Credibility

As an instructor, your approach is key to establishing credibility with your audience. Your appearance and professionalism will help set the tone. Make sure you dress for the occasion – business casual for a casual training atmosphere and business attire for a business casual atmosphere. Your professionalism should be demonstrated in everything you do – from having the classroom ready to go at the scheduled time and greeting the participants to returning promptly from breaks. Finally, your level of preparation and knowledge will be apparent, especially if you have done your homework.

Presentation and Communication Tips

How well your class goes is highly dependent on how well you present the information and communicate feedback. Below are some basic presentation and communication tips.

- Be professional.
- Speak to your audience; use familiar terminology.
- Be natural; be yourself.
- Be sincere; if you don't know, say so! And then find out later.
- Be dynamic; move around, use inflection and volume changes for emphasis.
- Be relaxed.
- Interact with students, both in class and on break.
- Make eye contact and scan the room to engage all participants.
- Try not to read from the manual. Use your own manual that you have written hints, phrases, or cues to assist you.
- Use, but be judicious, analogies, anecdotes, or professional experiences to make a point or engage the audience.
- Be conscious of your body language (posture, facial expressions, gestures) when providing feedback. Your body language can speak volumes.
- Use name tents and call people by name.
- Listen to the question asked and try to restate them to ensure you have the question correct.

Managing the Training Environment

Success also depends on how well you handle various situations that may occur during the training. For example, the software application may fail, the network may not be working, students may be complaining about the pace of the class, one student may not be paying attention and keeps falling behind. Table 1 contains common classroom management problems with techniques to help you handle them.

Situation	Technique
The pace of the entire class is moving too fast or too slow. Participants seem either bored or lost.	<ul style="list-style-type: none"> ▪ If the class is moving too fast, slow down. You can always make up time covering topics the class is picking up quicker. ▪ If the class is too slow, move faster through the topics or try to re-establish relevancy. Most people seem to pay attention when the topic is interesting and relevant.
Participants are not following the instructor. Some are way ahead of the instructor or some a way behind.	<ul style="list-style-type: none"> ▪ Walking the classroom helps to keep people focused. People are less likely to surf the Internet if you behind them. Walking the class also helps you to gauge whether the class is staying with you. ▪ If the students are way ahead, you may need to pick up the pace or rein those ahead in. Remind them to stay with the class as they may miss an important step or piece of information. ▪ If a few students are falling behind, you can: <ul style="list-style-type: none"> ○ Continue to move forward and help to get them caught up on a break or after lunch. ○ Give those ahead an impromptu exercise and catch the others up. ○ Elicit “student” teachers to assist the others in getting caught up.
The Training Facility’s Network Fails, Access to the Internet is lost, or connectivity with Source Database is interrupted.	<ul style="list-style-type: none"> ▪ Take an unscheduled 10-minute break to allow you to notify the facility and assess the situation. Fully brief students when they return. ▪ Continue to follow the curriculum, talking through description of processes in great detail. ▪ Draw an approximation of application screens on white/chalk board or butcher paper to illustrate discussion points.
Overhead Projector Fails.	<ul style="list-style-type: none"> ▪ Try immediate action remedy’s to correct problem. ▪ If unable to rectify problem with immediate action (in 2 minutes) notify Facility Manager, and continue training. ▪ If you are using PowerPoint presentation to support lecture, continue lecture using white/chalk board to capture main ideas. ▪ If you are using Projector to display Instructor’s computer workstation output of an application, Instructor moves from front of class to position in rear of class where he/she can observe students’ monitors, and continue training.
Disruptive Student Repeatedly Asks Irrelevant Questions or Makes Statements which Reflect a Negative Attitude Regarding Training or the System/Topic.	<ul style="list-style-type: none"> ▪ Maintain a professional demeanor, point out that this training is necessary, a professional responsibility, and the importance of making the most of this opportunity. ▪ If disruptive student continues behavior, ask him to join you for a beverage during a break, point out the impact of his/her behavior, and ask him/her to “support” your difficult task by refraining from negative behavior. ▪ Point out that you would welcome his/her detailed comments or the course evaluation, and will ensure they receive attention. ▪ If all the above fails, contact your reporting senior, and request they take immediate action to remove the individual from training.

Additional Tips

- Remember to review the objectives of the lesson before you begin your instruction. They are included to the focus the student’s attention.
- Know how all equipment in the room operates.
- Know where all services and facilities in building are.
- Know where you are in accomplishing the current class, and what remains.
- Monitor the time.
- Monitor the mood and alertness of students.



Section 5: Assess and Evaluate

Training should be dynamic, never static. Continual improvement is the key to maintaining quality.

Assessment examines participants' performance while evaluation examines the instructor's performance and effectiveness of the course materials. Both assessment and evaluation are instrumental components for improving training.

Assessment

Student performance should be assessed throughout and at the completion of a course to build the student's confidence and to identify areas of both strength and weakness within the course. When students can perform the stated tasks, they are more confident that they will be able to perform the tasks when they return to their jobs. Final course assessments provide that feedback to both students and the instructor.

While student assessment helps to foster confidence, it also serves as a mechanism to identify areas of strength and weakness within the course. Indicators of well-taught material are tasks performed well by most or all of the students during an assessment. Conversely, tasks that are not performed well may indicate areas for improvement. Group review of the ill-performed tasks will reveal whether it was the training or not.

Assessments have been included with the training materials provided by the USDA. Practical exercises and review exercises are a form of assessment and should be used to identify areas for improvement. The final assessment for the courses should also be used for this.

Evaluation

Course evaluations provide valuable information about the course materials used to train and the instructor's performance. These evaluations are typically given at the end of the training event, but could be used daily or mid-way through a course to assist the instructor in uncovering unclear topics or tasks. Course evaluations disseminated at the end of the training should be analyzed to pinpoint areas within the course that were favorable and areas that may need improvement. An analysis of the final assessment, in conjunction with the course evaluations, should indicate areas of weakness within the training. The instructor should investigate further to determine whether it was the materials, the presentation, or a combination of both.

A sample course evaluation is available in Enclosure 2: Sample Training Course Evaluation.



Section 6: Report

A brief written report is a professional way for the Instructor to complete his/her training task. This report serves as a formal means to inform management that training was conducted, and to provide the results. This report should include:

- A summary of the training conducted (Who, what, where, when, when and why).
- The Instructor's subjective observations on the event.
- The overall assessment results.
- The consolidated evaluation results.
- Any additional information required by management may be added to the report

A sample report format has been developed to guide you through this process. See Enclosure 3: Sample Training Results Report.

Post-Training Report

April 18, 2003

I. **Course:** _____

II. **Training Dates:** <FROM> - <TO>

III. **Instructor(s):** 1. _____
2. _____
3. _____

IV. **No. Students:** ____

V. **Location:** _____

VI. **Instructional Goal:**

VII. **Summary of Student Assessment Metrics:**

Line	Assessment	High Score	Low Score	Class Average
1	Inventory Knowledge Test			
2	Quiz #1			
3	Quiz #2			
4	Quiz #3			
5	Course Final Test			



Training Course Evaluation

Session: <Course Designator: Name>
Date: <Delivery Date(s)>
Instructor: <Name>
Course Objectives: <State Course Objectives>

Your constructive assessment of the quality and value of your training experience is extremely important to us, and essential in our efforts to continue providing the quality products and services you need. Please take a few minutes to complete this questionnaire, and return it to a member of our staff. Please add additional comments at the end of the form for all items you scored below a 3 (Satisfactory) to help us to pinpoint areas of improvement. Other comments are welcome also.

1. The Course Materials provided were:

5. Excellent
 4. Very Good
 3. Satisfactory
 2. Marginal
 1. Unsatisfactory

2. The Course Content was:

5. Excellent
 4. Very Good
 3. Satisfactory
 2. Marginal
 1. Unsatisfactory

3. The Length of this Course was:

5. Excellent
 4. Very Good
 3. Satisfactory
 2. Marginal
 1. Unsatisfactory

4. The Pace of this Course was:

5. Excellent
 4. Very Good
 3. Satisfactory
 2. Marginal
 1. Unsatisfactory

5. The Instructor was:

5. Excellent
 4. Very Good
 3. Satisfactory
 2. Marginal
 1. Unsatisfactory

6. The Facilities were:

5. Excellent
 4. Very Good
 3. Satisfactory
 2. Marginal
 1. Unsatisfactory

7. Relevance to Job Requirements/Responsibilities:

5. Excellent
 4. Very Good
 3. Satisfactory
 2. Marginal
 1. Unsatisfactory

Kickoff Tips Checklist

General

Example

- | | |
|---|--|
| ___ Initiating Authority or Sponsor of Training is: | [Organization] |
| ___ Individual Objective for Each Student is: | [Desired Outcome] |
| ___ Each training day begins at: | [Time] |
| ___ Each training day ends at: | [Time] |
| ___ This course concludes at (date/time): | [Date & Time] |
| ___ The Facilities to be Utilized for Training are: | [Identify all facilities to be utilized] |
| ___ The Overarching Objective for the Instructor and Students is: | [Instructional Goal] |

Classroom Decorum

- | | |
|--|--------------------------------------|
| ___ Be Prompt | [A courtesy to others] |
| ___ Mute Cell Phones, Pagers & PDAs | [A courtesy to others] |
| ___ Communication in Class - Only One Person Talks at a Time | [A courtesy to others] |
| ___ Instructor Phone and Email Address | [To be reached in case of emergency] |
| ___ Policy on Food & Beverages in Class | [Yes or No] |
| ___ Policy on Computer Use for Email or Internet Access in Class | [During Breaks Only] |

Techniques of Instruction to be Utilized

- | | |
|--------------------------|---|
| ___ Lecture | [Instructor Talks] |
| ___ Presentation | [PowerPoint Presentation] |
| ___ Demonstration | [Instructor Demonstrates Skill] |
| ___ Guided Learning | [Instructor Led Exercise] |
| ___ Student Teaching | [Student Performs Example of Skill] |
| ___ Group Work | [Small Working Group Activities] |
| ___ Role Play | [2 Students Working Through a Simulation] |
| ___ Independent Practice | [Practical Exercise] |
| ___ Assessment | [Test or Quiz] |



Logistics Checklist

- | | |
|--|---|
| <input type="checkbox"/> Facility Hours Closed? | <input type="checkbox"/> What are Procedures for Handling Personal Messages at Facility? |
| <input type="checkbox"/> Are Access Badges Required? | <input type="checkbox"/> At What Phone Number Can Personal Messages Be Received for Students? |
| <input type="checkbox"/> What Are Temporary Access Procedures? | <input type="checkbox"/> Are Pay or FTS Telephones Available? |
| <input type="checkbox"/> What Personal Info Does Security Manager Require for Each Training Participant? | <input type="checkbox"/> Are Beverages & Snacks Available from Vending Machines or Snack Bar? |
| <input type="checkbox"/> Transportation To/From Airport? | <input type="checkbox"/> What Local Cafeterias & Restaurants are Nearby for Lunch? |
| <input type="checkbox"/> Transportation Between Facility and Hotel? | |
| <input type="checkbox"/> Parking at Facility? | |

Classroom

Other

- | | |
|--|---|
| <input type="checkbox"/> Do Classrooms have White or Chalk Boards? | <input type="checkbox"/> Is There a Copy Machine Available? |
| <input type="checkbox"/> Are Dry Erase Markers, Chalk & Erasers Provided? | <input type="checkbox"/> Is There a Fax Machine Available? |
| <input type="checkbox"/> Is a Flip Chart with Paper & Markers Provided? | |
| <input type="checkbox"/> Is There a Podium in Classroom? | |
| <input type="checkbox"/> Is There a Desk/Computer Workstation Dedicated for an Instructor? | |
| <input type="checkbox"/> How Many Student Desks / Computer Workstations? | |
| <input type="checkbox"/> How are Student Workstations Arranged? Center & Side Aisles? | |
| <input type="checkbox"/> What Types of Lights in Classroom? | |
| <input type="checkbox"/> Do Classroom Lights Have Adjustable Intensity? | |
| <input type="checkbox"/> Are Light Switches Controlled from Instructor Workstation? | |
| <input type="checkbox"/> Is Classroom Thermostat Accessible & Adjustable? | |
| <input type="checkbox"/> Do Windows Have Shades or Blinds to Manage Sunlight / Glare? | |



Instructor Tips Checklist

General

- Be Prepared for Training
- Be Knowledgeable on All Topics Covered
- Be Experienced with Systems / References
- Be Appropriate & Professional in Appearance
- Be Professional in Demeanor

In Class

- Be Natural - Be Yourself
- Be Sincere - If You Don't Know, Say So
- Be Dynamic - Move, Use Inflection & Volume
- Be Relaxed
- Interact with Students-In and Outside of Class
- Continuously Make Eye Contact
- Be Judicious Using Anecdotes & Experiences

Types of Training Media

- Course Handouts
- Detailed Outlines
- References & Enclosures
- White or Chalk Boards
- Flip Charts
- VCRs
- Audio
- Presentations Using Overhead Projectors
- Internet

Communications in Class

- Volume - Ensure All Hear Question & Response
- Use Group-Appropriate Terminology
- Make Frequent Eye Contact with Students
- Movement - Be Mobile, Active & Energetic
- Body Language - Confident / Enthusiastic
- Use Open and Closed Questions
- Listen Carefully to Questions
- Restate Questions for Clarity
- Decide Who Should Respond - You or Class
- Determine Appropriate Response

Style Tips

- Never Turn Your Back to Class
- Never Read from a Training Aid
- Use Training Aid as a Tool, Never a Crutch

Manage the Training Environment

- Know Course Materials
- Know Course Delivery Strategy
- Know How All Equipment Operates
- Know Where All Services & Facilities Are
- Know Name & a Fact or Two of Each Student
- Know Baseline of Skills & Experience of Class
- Know Where You are in Curriculum Delivery
- Know the Time
- Know the Mood & Alertness of Students



Training Analysis Checklist

General

___ Specified Tasks?

___ Implied Tasks?

The 'Who'

___ How Many?

___ Local or Traveling to Central Training Site?

___ Experience in Training Subject Matter?

___ Requisite Knowledge or Computer Skills?

___ Special Requirements / Physical Limitations?

The 'What'

___ What is the Topic or Subject Matter?

___ What is the Method(s) of Delivery?

___ What Basic Materials / Facilities Required?

The 'When'

___ Date Training Must Begin or Be Completed?

___ Do Training Dates Include Mon. or Fri.?

___ Estimated Hours to Complete Training?

___ Known Limits to Available Training Hours?

The 'Where'

___ Location of Primary Training Facility?

___ Location of Alternate Training Facility?

___ Is Facility Centrally Located for Attendees?

___ Is There a Nearby Transportation Hub?

The 'Why'

___ The Purpose, Aim or Goal of Training?

___ Why This Audience?

___ Why This Training Now?

Feasible-Suitable-Acceptable?

___ Sufficient Resources to Accomplish Training?

___ Is Training Appropriate to Requirements?

___ Appropriate Use of Critical Resources?



Hardware / Software Systems Checklist

The purpose of this checklist is to ensure that the system you are training on is all ready to go the first day of training. To do that, you first need to determine what the technical requirements are to conduct the training. (The system IT representative and a subject matter expert should be able to assist you with the first step of this.)

1. What are the minimum hardware specs to support the training software?

___ Available hard drive space:

___ Available memory:

___ Processor type/speed:

___ Floppy or R/W CD-ROM:

___ Monitor Size:

___ Monitor Resolution:

2. What software is required?

___ Operating System?

___ Application Software (e.g., MS Office, Oracle Discoverer/Forms, WordPerfect,)?

___ Browser?

___ Other (e.g., Adobe Acrobat Reader, Java Virtual Machine, WinZip, Flash)

3. What additional technical issues should you be aware of?

___ Database accessibility (e.g., outside or inside USDA backbone, behind firewall,)?

___ Printer access? Instructor? Students?



____ Student work product - floppy disks or writeable CDs needed for storage?

Now that you have the specifications for what is needed, the following questions should be discussed with the facility's IT contact. Note: Depending on the specifications, some of these questions may not need to be asked.

Hardware

Software

____ Are Computers Networked?

____ What Software Loaded?

____ Is it a USDA Network?

____ What Operating Systems / Service Packs?

____ Is Network Behind a Firewall?

____ What Application Software is Pre-Loaded

____ Can Required User Applications Pass Firewall?

____ What is the Default Browser? What Version?

____ How are Student User IDs & Passwords Established?

____ Is Adobe Acrobat Reader Loaded?

____ Is a Network Printer Available?

____ Is WinZip Loaded?

____ Is Toner & Paper Supply Provided / Available?

____ Is There a Current Java Virtual Machine (JVM) Loaded?

____ Is There Internet Access from Classroom Workstations?

____ What is Capability to Upgrade O/S, if Required?

____ Is Internet Access via High or Low Rate Connection?

____ What is Capability to Load S/W Apps, if Required?

____ Is Help Desk Support Readily Available?

____ Can Systems Be Wiped and Mirrored to Instructor's Spec?

____ What are Help Desk Support Procedures?

____ Is System Administrator On-Site?

____ What are System Admin Support Procedures?

____ Type and Speed of Computer Processors

____ Computer Memory Capacity?

____ Computer Storage Capacity?

____ Monitor Size?

____ Monitor Resolution Capability?

____ Types of Floppy Drives Available?

____ How Many Student Workstations?



- Instructor Workstation?
- Is Overhead Projector Slaved to Instructor W/S?
- Is There a Remote Control for Overhead Projector?
- Does Remote Control Contain a Laser Pointer?
- Is Projection Screen Manual or Powered ?

The following tasks should be completed by the instructor to ensure hardware and software are working properly the day before training.

- Coordinated with facility's IT person and software is loaded.
- Confirmed training database has been reset.
- Checked all PCs at facility to ensure software is loaded and running.
- Checked all user IDs and passwords to ensure they are working.
- Checked all PCs connected to a printer and they are working.
- Checked all PCs for Internet connectivity.