

Training Best Practices:  
**TRAINING DESIGN**



It is easy for a subject matter expert to assume that they can deliver training without any preparation. Though their expertise is essential, research has shown that experts generally are not able to ascertain what a learner needs to know<sup>1</sup>. Therefore, take a few steps to ensure that the identified performance gap is indeed addressed through your training solution.

## Planning your training program

Early and collaborative planning can help you efficiently organize your training program. Some best practices to follow include:

- 1. Establish a training committee.** Include experts from the health sector, partner organizations and other key stakeholders to agree on and plan the curricula, training structure and implementation. Assign specific tasks with deadlines to members of the committee and meet regularly. Involve key health authorities and stakeholders from the start so they are aware of the training and approach.
- 2. Identify training needs, aims and objectives.** Define what you want to achieve through this training based on needs assessments, job functions or new practices.
- 3. Specify who needs to be trained and numbers of people to be trained.** Clearly identify who needs to be trained. Look at their job functions to ensure that the right candidates receive training and make sure that the coursework meets the requirements of their job.
- 4. Specify who will do the training.** Trainers should be qualified, committed to the continuation and success of the training program and have good leadership skills. Trainers from the same region where the training will be delivered can be beneficial, as they will know the local context. If trainers have additional responsibilities, (e.g. EPI technical staff) provide clear expectations of time and responsibility requirements, to minimize conflicts with their regular duties.
- 5. Design an evaluation and supervision strategy** to help measure effectiveness of the training and its impact on performance.
- 6. Engage supervisors in the planning process.** There should also be a strategy for engaging supervisors of the intended target audience, either in the training or separately. This helps to know the training needs and/or contextual factors that need to be addressed in the training. It is also important that supervisors are aware of and support the new practice and that they are included in post-training performance monitoring.
- 7. Develop the schedule last.** If you are developing classroom training, do not begin with the schedule. Begin with the course objectives, then map out content activities to achieve those activities, and estimate the required class time. Only then can you know how much time the class will take. Adjust the schedule and content based on realistic limitations, such as time and budget.

1. Chase, WG and Simon, HA (1973) Perception in chess. *Cognitive psychology*, 4 (1), 55-81. Daley, B. (1999). Novice to expert: an exploration of how professionals learn. *Adult education quarterly*, 49(4), 133-147.

The process below can help you progress from a vague request for training to a specific performance-based intervention:



**GROUND RULES**

- Begin with the end goal in mind
- Each step requires Subject Matter Expert participation and/or review

Step	Notes	Example
<p><b>1. Organizational weakness/opportunity/initiative</b></p>	<p>What is broken? What is new? What does the organization want to see that is not happening now?</p>	<p>Disease surveillance is poor at the district level. We wish to:</p> <ul style="list-style-type: none"> <li>• Improve reporting of epidemic prone diseases, such as measles</li> <li>• Reduce misdiagnosis through the use of standard case definitions</li> <li>• Increase methods of data analysis, such as line listings, charts, tables and graphs</li> <li>• Conduct health education for front line workers to improve compliance with reporting requirements</li> <li>• Begin or expand actions to improve data quality</li> </ul>
<p><b>2. Workforce that is affected (job titles)</b></p>	<p>Could include new responsibilities, which could require a whole new person or change to existing staff job description</p>	<p>District surveillance officers(DSO), district medical officers, district lab workers</p>
<p><b>3. Specific work those workers will/should do</b></p>	<p>Does not need to include all their responsibilities, only those connected with the defined initiative</p>	<p>DSO:</p> <ul style="list-style-type: none"> <li>• Collect data from area health facilities</li> <li>• Summarize, analyze and interpret data</li> <li>• Prepare weekly reports</li> <li>• Conduct data quality audits</li> <li>• Assist outbreak investigations</li> </ul>

Step	Notes	Example
<p><b>4. Competency(ies) this work requires</b></p>	<p>Does not need to include all their competencies, only those related to the work. Generally articulated as a series of short statements.</p>	<ul style="list-style-type: none"> <li>• Monitor and assess the quality of local public health surveillance data</li> <li>• Analyze and interpret surveillance data regularly</li> <li>• Prepare surveillance summary reports that describe patterns of disease occurrence in the community and provide information that is useful for public health decision-making</li> <li>• Communicate effectively with public health decision makers</li> </ul>
<p><b>5. Deliverables: outputs /behaviors of the expected work, evidence that someone is competent</b></p>	<p>At this point you might notice varying levels of performance: expectations of an accomplished performer vs a beginner. It should be clear how each deliverable connects to at least one competency, and how they support Step 1.</p>	<ul style="list-style-type: none"> <li>• ‘Timely’ reports of WHO notifiable diseases, listing counts and rates (must define ‘timely’)</li> <li>• Regular communications with health facilities(must define ‘regular’)</li> <li>• Regular supportive supervision visits to facilities</li> <li>• Charts, maps or other graphics clearly displayed on walls</li> <li>• Use of standard case definitions to report disease</li> <li>• Daily zero reporting for priority diseases (e.g. AFP)</li> </ul>
<p><b>6. Target Audience: workers</b></p>	<p>Who must be involved in this program? Are these individuals who are currently in the job but who must improve? Is this a new job title? Are these individuals who are in the government system but for whom these competencies create a career path? If career advancement is not expected, will need additional analysis to identify motivations for participation in the program.</p>	<p>District surveillance officers in priority districts as identified by MOH. Successful graduates will return to their current position and do their job better. Daily zero reporting is a new job requirement.</p> <p>Successful graduates are eligible to be identified for future promotion.</p>
<p><b>7. Timing</b></p>	<p>Based on past experience, interviews with accomplished performers, or other means, estimate how much time would be reasonable for the target audience to attain competency.</p>	<p>10-12 weeks</p>

Step	Notes	Example
<p><b>8. Interim deliverables</b></p>	<p>Identify any subcomponents that can be considered major milestones in the development of competency</p>	<ul style="list-style-type: none"> <li>• Surveillance summary report with 6 weeks' of data</li> <li>• Report of visit to 3 health facilities</li> <li>• Data quality audit</li> <li>• Education on use of case definitions</li> <li>• Monthly summary of zero reports</li> </ul>
<p><b>9. Timeline</b></p>	<p>Sketch overall timeline of a program that illustrates any interim deliverables and culminates in the final deliverables. Work <b>backwards</b> from the deliverables.</p>	<ul style="list-style-type: none"> <li>• Introductory course, 3-5 days</li> <li>• Field work (on the job)- 6 weeks. 2 deliverables: surveillance summary report with 6 wks data, data quality audit</li> <li>• Workshop 2, 4-5 days</li> <li>• Field work (on the job), 4-6 weeks Any 2: Report of a case investigation, Outbreak investigation report, Expanded surveillance summary report, Analysis of surveillance quality problem and recommend improvements, Presentation to decision maker</li> <li>• Workshop 3, 1 day Wrap-up, graduation</li> </ul>
<p><b>10. Begin curriculum design</b></p>	<p>Using interim deliverables as a guide, determine general content based on the profile of the target audience. Begin to determine delivery methods, including distance learning if applicable.</p>	<ol style="list-style-type: none"> <li>1. Introductory course: surveillance, data analysis, data quality</li> <li>2. Field work 1: 3 site visits, data quality audit, surveillance summary report</li> <li>3. Workshop 2: Present their field work results, Outbreak investigation and response, Linking with the laboratory, Problem analysis, Report writing, Scientific presentation skills</li> <li>4. Field work 2: Any 2: Report of a case investigation, Outbreak investigation report, Expanded surveillance summary report, Analysis of surveillance quality problem and recommend improvements, Presentation to decision maker</li> <li>5. Ending workshop: field reports, closing ceremony</li> </ol>

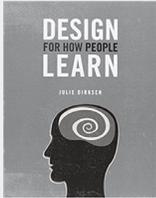
Step	Notes	Example
<b>11. Identify environment, performance support and other factors</b>	Identify required resources that must be in place in order for the target audience to succeed, such as needed processes or resources. Also begin to identify methods to support on the job performance to assist learners.	1. Country-specific technical guidelines 2. Performance support: field product guidelines 3. Mentors & mentor guidelines 4. Laptops 5. Simple phones for daily zero reporting text messages
<b>12. Develop lesson plan</b>	Based on interim deliverables and curriculum design, determine course flow, then topics, activities, and evaluation methods. Incorporate elements identified in #11 as much as possible.	Detailed document with topics, learning objectives, high level summary of activities, high level course schedule, estimated lesson time.
<b>13. Develop content</b>	Determine delivery mode (classroom, distance-based) & training method (problem-based, case study, workshop, etc). Include evaluation methods and on the job performance support. Helpful to develop a list of training deliverables to track progress of all components.	Case studies Daily quizzes Review sheet Field product guidelines Job aids/reference cards Detailed class schedule (classroom only)

Content can then be tested in an environment similar to the target environment. Make revisions based on findings from pilot.

While content is being developed, conduct implementation and sustainability planning. (Stakeholder meetings, logistics planning, faculty identification & training, participant recruitment)

## Annex 1: Resources

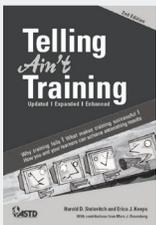
### Books



**Design for How People Learn**  
Dirksen, Julie. New Riders Publishers, 2016.



**Active Training**  
Silberman, Mel, Biech, Elaine. 4th ed. Wiley, 2015.



**Telling Ain't Training**  
Stolovitch, Harold D., Keeps, Erica J. American Society for Training and Development; May, 2002.

### Internet sites

Association for Talent Development | [www.atd.org](http://www.atd.org)

Training Magazine | <https://trainingmag.com>

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