Train the Trainer - Training Coordination

HOW TO DEVELOP A TRAINING PLAN

Development and execution of a well-conceived training plan is the cornerstone upon which a successful training program rests.

A training plan exists on at least two levels:

1) Corporate - encompassing the entire organization and covering a relatively elastic time period of perhaps several years (this is a reflection of a global or overall set of goals)
2) Specific - describing smaller organizational units within the organization and covering a discrete fiscal or calendar time frame (this is a reflection of concrete, measurable goals and objectives)

The following is a suggested template which will help guide you through the process of developing your training plan. The template identifies a number of basic elements that should be included in your training plan and will make your plan more useful as a tool in guiding you through your training program. Please keep in mind that the following template is just a guide and can be altered and changed to suit the needs of your branch or program. Also keep in mind that your training plan need not be overly complex, but without a framework of some kind, your exhaustive training efforts may not bear the fruit it should.

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TRAINING PLAN ELEMENTS

Background
The Training Plan should begin with a background section which describes the following:

- A description of the Cabinet Training Directive or your own purpose for developing a Training Plan.
- Who is the core client group? Within this client group there may be field and regional offices throughout the Province. If this is the case, you may want to divide the client group into geographical areas.
- What is the total number of employees in the Ministry? Indicate approximately how many of these employees are local and if possible, how many are in each geographic area.
- Any other pertinent information you feel would be appropriate under the Background section such as:
  - new organizational-driven requirements (newly formed groups, programs, branches)
  - changes in profile of service-orientated delivery versus product orientated business models within your organization
  - decentralization of FOI and/or general administration duties within your organization
  - goal to reduce formal FOI requests, etc.

The background section should be predominantly narrative in structure with perhaps a table or organizational chart to assist you in framing the context of your plan.

Current Status
The purpose of this section is to describe what sort of training has been completed to date. This section of the corporate plan should be updated each year, and referenced against the previous year for comparative purposes.

- What sort of training has been completed to date? Has the training been Ad Hoc and demand driven or …
- Has there been a formal training plan? If yes, to what extent has the training plan been completed? Did training include out-of-town travel?

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Current Status (cont'd)

- What are the factors that limit training?
- Is there a training budget? If yes, what is it and how much, if any, has already been spent?
- Has there been any needs assessment conducted to identify what sort of training is needed by headquarters and field offices? If no needs assessment has been conducted, this may be something to add as part of your overall training plan?
- Has a need for training evolved by the type of repeat questions and telephone calls for advice you have received?

This section will be greatly assisted by including a table to indicate current readiness against total numbers within targeted employee groups.

Mission Statement

The Mission Statement should address what it is you hope to achieve in a global sense with the training plan. For example, your overall goal may be:

To ensure all ministry staff have a comprehensive baseline awareness of the ***Freedom of Information and Protection of Privacy Act*** *(the Act) and understand their roles and responsibilities in complying with the Act.*

It may take one or several different types of training and probably a number of sessions to reach this overall goal. The overall goal differs from course goals and objectives because it is much broader and all-encompassing than course goals and objectives which tend to be more specific to the training and more limited in scope. It would be very challenging to reach the above overall goal in one or even 5 years. A number of different types of training would have to be implemented in order to reach the overall goal. Course goals and objectives are also much more measurable than the overall goal because course participants can help you assess whether or not you have met them.

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Methodology
The methodology describes the approaches to training delivery that will be employed. For example, your training plan may cover 2 years, 5 years and only one course, or perhaps a phased approach would be more appropriate for your ministry. You may begin with general training one year and include more advanced training the following year. You may also want to offer one or two courses a year on specific topics. The options for this portion of the training plan are limitless.

- How will you reach your overall goal?
- What type of training will be offered? General awareness sessions or topic specific training? Will the training be branch specific in some cases?
- Will you develop brochures and other documents that explain FOI concepts, roles and responsibilities?
- Will you train via video-conference or satellite TV, create a video that staff can sign-out or create a FOI Hotline?
- Who would be expected to participate in which training? Will the training be catered to a specific client group?

Training Methodology should also be updated each year in the corporate plan as delivery methods are evaluated.

Description of Training
If you are doing more than one type of training, you may repeat this section in order to describe each type of training you will be conducting (this is where your training plan becomes more specific both in terms of deliverable and time frames).

Time Frames
Approximately when will the training be offered? Will it be offered from January to March every year or just for 1999? Will a session be offered once in September and once in February every year or one year? Will the training be offered quarterly, yearly, monthly or weekly even?

Approximately when do you expect to have brochures or other documentation complete? Will the documentation be updated each year? When do you expect to have your Web Page up and running?

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Goals
What goal(s) do you hope to achieve from the specific training that you plan to offer?

Identify Clients: First identify which client group will benefit from the training: Is the goal to ensure all staff in the ministry have the opportunity to participate in FOI Awareness Training or is the goal that all staff must participate in FOI Awareness Training? Is the goal to train all local staff, or all staff throughout the Province or is the goal to identify FOI contacts in branches and throughout the Province and just provide training to them? Maybe only certain identified staff in a Division will require the training? Decide who the clients for your training will be and then develop one goal to include these clients in some sort of training.

Objectives: Once you have identified the client group that requires training, then identify what you hope the participants walk away with: Is the goal to provide a comprehensive base-level of expertise to support the client groups compliance with the Act or is the goal to ensure all contract managers participate in training that specifically focuses on the impact of the FOI Act for contractor records? What needs of the client group can you fulfill?

Learning Objectives
Learning objectives are specific and measurable. Learning objectives identify specifically what the participants will do/learn/understand/identify/recognize etc…

Some examples of objectives would include any of the following:

The participant will:
- understand the public’s right of access
- recognize government’s responsibilities regarding the collection, use and disclosure of personal information
- learn to apply FOIPOP principles
- identify records that require formal FOI response vs. routine release of information
- understand how contractors are affected by the Act
- identify records under the control and/or custody of the public body and those under the control and/or custody of the contractor
- identify exceptions that would apply to records in each branch’s custody and control

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Organization
What do you need to accomplish the training objectives?

Coordination of Training Delivery:
- Do you need to identify and coordinate a number of training sessions to cover each branch or geographic region? Do you need to find facilities that will be available on a given date?
- Do you have to solicit participants? If yes, will you send out a general e-mail or contact people by phone or post an advertisement? Will you have registration via the Intranet?
- How will the training be delivered? Will a facilitator actually give the session, will it be given via video-conferencing or will you develop a brochure or package that is self-explanatory? Will you create a video to send around the Province? Will you have a Web Page or a FOI Hot Line?
- Evaluation - How will you analyze the delivery outcomes and identify shortfalls of the training method?
- Is the facilitator willing to travel?

Materials:
Once you have identified how you will deliver the training, what materials do you need to deliver the training:
- Will you use slides, video or satellite TV?
- What sort of hand-outs will you provide participants?
- Will participants be expected to participate in case studies, pre-tests and/or post-tests?
- Will there be a poster you want to use?
- Will you be handing out business cards?
- Will you want to use an excerpt from a video?
- Will you develop a pamphlet/staff guide, etc., to supplement your training?

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Training Schedule and Budget
Finally, the Training Schedule and Budget specifically identifies the date, method, cost and approximate number of participants to be trained.

It would be useful to identify the approximate number of participants to be trained by staff level (this will make it easier to report back to ISTA in complying with the Cabinet Training Directive):
- program delivery and support staff
- central administrative staff (i.e. Personnel, Policy and Finance)
- director level
- Ministry executive
- other (e.g. Contractors)

For example you may decide to train approximately 20 people on September 24, 1999 locally by conducting a training session with yourself as the facilitator. The cost in this case is not applicable. You may, however, decide to conduct the same training in Kamloops for approximately $340.00 (this includes 1 night accommodation at about $80.00 for one night, transportation to and from course location, about $40.00, meal allowance of about $38.00 and the air flight at about $192.00). Cost would be a factor in getting brochures printed through Queens Printer or contracting someone to set-up a Web site.

REPORTING

Finally, when the annual round of training is complete, you should consider the type of reporting you wish to do. A summary of the above information is a good place to start and you can flesh out this report with the actual cost and number of participants trained. This information will be helpful in forming part of your overall evaluation of the training program.

You may also want to create an Executive Summary to report on the successes to date, the challenges ahead, and the potential impact on staff and budget for the coming fiscal year.

SOLICITING AND COORDINATING ATTENDEES

The following is a suggested plan which will help the trainer through the process of soliciting and coordinating attendees for training sessions. Before conducting training, it is helpful to know the audience, their level of FOI awareness and to have a handle on where they are located. This information will greatly assist you in ensuring a successful training session and in conducting post-training analysis and reporting.

SOLICITING ATTENDEES

Needs Analysis Survey

If you are **not** working from a Training Plan that includes a **Needs Analysis** then a helpful first step in soliciting attendees is to determine what the needs of the staff are. This can be expressed as a reflection of your own FOI program goals and objectives, or in conjunction with the needs expressed by the targeted staff. In either case, it is helpful to develop a training survey that can be distributed to program areas in your Ministry. This will allow the trainer to determine the levels of training needed.

Develop the Survey

Begin by explaining the purpose of the survey. From here, move on to provide examples of the types of training your FOI program is prepared to offer. When describing the offerings, it is important to state what the learning objectives of each sessions are. If you do not include a statement of objectives staff may not fully understand what will be accomplished through the training sessions and their responses will be less useful. A sample of useful survey elements is provided on the following pages. Based on the elements of this survey sample, a survey response form can be tailored to your specific needs.

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Sample Needs Analysis Survey

The Information and Privacy Branch is preparing training sessions for the delivery of training to Ministry employees pertaining to the Freedom of Information and Protection of Privacy Act (the Act).

Review the training modules listed below to determine what level of training, if any, is needed or desired by your program area. The Information and Privacy Branch is able to modify any of these models to best suit the needs of your program area including the development of specific case exercises and topics of most interest to you. After you have reviewed the following modules, please canvass your staff and identify any special needs as well as the number and geographic location of staff to be trained. The Information and Privacy Branch will then work with respective program areas to develop and schedule training sessions.

General Information Sessions

General Information sessions on the Act can be tailored to meet the needs and time frame of a specific target group. This can be accomplished by tapping into staff meetings or mini-conferences which would likely be least disruptive to normal duties. Resources of an information session would include sessions from an already existing training course and could be modified to fit the needs of the program area.

Learning Objectives - Staff will:

- understand the general purpose of the Act
- be able to direct requests through the formal application process
- begin to appreciate privacy impacts of the legislation in their day-to-day work

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Problem Solving Sessions

Topic sessions are held with program areas that need to have specific problems or issues addressed. Suggestions for these sessions could include:

Learning Objectives - Staff will:
- be able to reconcile policy and program developments with FOI requirements
- gain a better understanding of how particular sections of the Act apply to their day-to-day operations
- be able to streamline procedures required by FOI administration
- be able to anticipate FOI issues in creating, storing and disseminating information

Introduction to the Freedom of Information and Protection of Privacy Act

The introductory course is a half-day session that is offered to all Ministry staff who require a working knowledge of the Act that is more than what can be obtained from brochures, videos and/or short briefings.

Learning objectives - Staff will:
- understand the public's right of access
- recognize exceptions under the Act
- identify records and requests that require formal FOI response vs. routine release of information
- appreciate legislated timelines
- recognize government's responsibilities regarding the collection, use and disclosure of personal information
- learn to apply FOIPOP principals
- provide them with a greater awareness of the Act's impact on their operations, particularly with respect to privacy issues.

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Disseminate
Once you have developed the survey, send it to the targeted group and give a deadline for responding. Sticking to deadlines, will allow the trainer to meet their own objectives in developing a viable training plan for the delivery of the courses and for determining what travel arrangements will need to be made.

Analyze Responses
Review the responses to the survey and develop schedules/plans based on the types of sessions requested factoring in geographic locations, budgets and urgency.

Once you have solicited potential participants, it is time to plan an approach to coordinating training delivery to them.

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COORDINATING ATTENDEES

Scheduling
There are at least two viable methods for determining training dates

1. *Pre-Scheduled Dates*
   Make a list of scheduled training dates and locations and respond to the program areas by advising when training sessions will be held (location, time, dates and duration). Establish a viability threshold for the number of attendees you need in order to conduct the training. It is helpful to send out a Course Registration Form to the program areas for distribution and completion by interested staff.

2. *Client Responsive Dates*
   Ask targeted staff to indicate potential training dates and courses preferred on a course registration form. Then, based on the dates and courses selected by the potential attendees, make selections that best accommodate the needs and limitations of your client group and communicate the dates to the targeted group.

Always confirm training schedules by sending out a memo or e-mail thanking participants for their interest and provide them with the date, time, location for the specific session they will be attending. Do this as soon as possible and re-confirm approximately one week prior to the training date.

Create a Training Data Base
Finally, you may find it useful to create a training data base where you can track course attendees, branch names, contact information, locations and dates. Creation and maintenance of a training data base will assist you in organizing your training, and it will provide the basis upon which you can create meaningful training reports. You should develop your database early in the game and keep it maintained and up to date. It can be daunting to begin this task after you have delivered the training to a number of attendees and, of course, it will not prove useful to you in organizing your training unless it is already in place.

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A simple Excel spreadsheet will provide you with all the power and flexibility your require. A suggested format is provided below:

Name	Branch	Telephone Number	Training. Location	Training. Date	Attended?
Smith, Adam	IDMB HQ - Victoria	356-7529	865 Yates Victoria	99/04/20	Yes
Jones, Paul	ITSD Field Office - Vancouver	660-7529	865 Yates Victoria	99/04/20	No

The spreadsheet can then be sorted by date, location and branch, and will also provide you with total numbers of attendees. This information is the basis upon which you can form your reporting structure.

You may also want to consider creating a data base to monitor and analyze the responses you receive from participants on evaluation forms. This will help you to update and modify your training sessions to maximize their value. Depending on the questions you ask, it may look something like this:

Instructor	**Date**	**Overall Rating**	**Objectives Met?**	**Methods Approp.**	**Course Material**	**Instructor Delivery**	**Mastery of Material**	**Questions Answered**
TJR	99/02/03	5	4	4	5	4	5	4
KLC	99/03/06	4	5	4	5	3	4	5
AFC	99/04/04	5	5	3	4	5	5	5
Totals (out of a possible 15)		14	14	11	14	12	14	14

The fields above are based on the course evaluation form provided in Section 4 of this manual. The numbers are averages of course participant responses to course satisfaction questions. Not all of the fields are represented in this sample, however, you can see that various observations about instructor performance and attendee satisfaction with the course can be extracted. This will provide you with valuable insight into what it is that you are doing right in your delivery, and where you have an opportunity to do even better.

TRAVELING AND TRAINING

Conducting training on the road presents a whole set of challenges all its own, and requires careful preparation and planning. For those of you who have had the experience, it can be a little like planning a wedding in a far off place. The organizer is often fraught with anxiety, expends a great deal of energy and prays that everything will turn out right.

Professional wedding coordinators will tell you, the key to success is attention to detail when making preparations and a willingness to take responsibility. It is the same when you take your training on the road. In the end, the only person you can rely upon one hundred per cent is yourself. This is not to say that you should not solicit the help of others, but it is up to you to ensure that they can and will deliver the goods or service you require, and to have a back-up plan in case they can't or don't.

The following are key considerations in bringing about success in the traveling "dog and pony show."

Training Location

Training needs analysis and budget considerations will, in large part, drive your training location decisions. Other factors to consider are:

Choose Your Training Location With Care

If you plan to provide training to staff from several field offices within a given geographic area, collaborate with local staff to determine the most suitable town/city from which to deliver the session. Keep in mind that while people outside of the lower mainland are generally less averse to the notion of traveling to conduct business, you should not push this envelope too far. If you do, you will only succeed in aggravating some attendees and/or find yourself in a relatively empty classroom.

Facilities

Again, working with local staff, determine which specific training or board room will suit your purposes, bearing in mind the number of attendees and the nature of the presentation.

Number of Attendees

- It is tempting to try to get the most "bang-for-the-buck" when traveling by maximizing the number of attendees at a session. Don't go overboard on this. Overcrowding will detract from the effectiveness and impact of your presentation/training. Stick to a comfortable number; one that you are familiar with handling and especially in interactive sessions, try to keep the number limited to no more than 15 - 20. Most board/training rooms will not comfortably accommodate more than this in any event.

Nature of the presentation

- will you require a lecture hall or theater-style arrangement for seating?
- will it be a seminar, workshop or other forum that requires tables or special equipment?

Equipment

Be sure to pick a facility where the following are **already in place, or can be provided easily:**

- overhead projector
- screen
- flip chart
- electrical outlets/cords
- TV and VCR if you need to use them

Room Set-Up

- can all attendees see the screen and presenter without straining?
- can tables be arranged in a “U” (most effective arrangement)?
- can windows be shaded?
- do lights have a dimmer?
- do you require disability access for yourself or attendees?

Facilities and location are the two biggest drivers in deciding which specific training room is used. If you are having difficulty finding a suitable training room in a location that works for you, give the local health unit a call. They almost always have a superb training room which they are happy to let you use. Be sure to book well in advance and confirm your booking at least a week prior to your training date.

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Facilities Check List

Is the room large enough to accommodate the participants?	
Is there a screen, overhead projector and flip chart available?	
Is there a TV and VCR available?	
Can all participants see the overheads?	
Do all participants have a table to write at?	
Are the chairs comfortable for the three hours?	
Is the location of the facility convenient for all participants?	
Do you require disability access?	
Are there sufficient electrical outlets and cords?	
Are the washroom facilities easily accessible?	
Is there a coffee location accessible?	

Timing/Scheduling

The timing of your training on the road can be important as well. Here are a few tips:

- avoid winter sessions (January and February)
- avoid Mondays and Fridays as training days (these are the two days of the week that see the most staff absences)
- if you plan to train during the summer, be aware of staff holiday schedules - this will affect not only potential attendees when planning your training schedule, but support staff as well who may not be on hand to help out with equipment, supplies, etc. (it may also complicate travel plans if you travel during peak holiday seasons)
- as with all training sessions you should be sure to confirm your schedule with attendees - it is even more important to do this when traveling and training

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Travel Arrangement Tips
Sometimes just getting there is half the battle. Here are some tips to keep in mind when arranging travel to conduct training:

- Be sure that the location you decide to train from has good transportation links. It is usually more cost-effective to fly, however, if you need to travel during inclement seasons, check to see that alternate transportation can be arranged should it become necessary.

- Always be sure to confirm your travel arrangements well in advance. Do this personally. Even if the task of making travel arrangements is an assigned one within your organization, or you need to delegate it, you should confirm the arrangements and delivery of tickets at least 3 days prior to your expected travel date.

- Plan to travel in the kind of clothes you intend to wear when conducting training sessions (in case your luggage does not arrive)

- Plan to arrive the afternoon of the day before the training because:
  a) This will give you the chance to visit the training site and satisfy yourself that all details are in place before the session, and
  b) Both you and your participants will greatly benefit from your having a good night's rest before the day of the presentation.

- **Handouts:** If you plan to use a number of handouts in your presentation, you may want to consider mailing them in advance. This will streamline your travel arrangements and ensure that you have enough copies when you begin your session.

  Another option is to mail or electronically transmit the photocopy masters to a contact at the location where you are to do your planning and have them do the photocopying for you. Be aware that this is less reliable than bringing your own.

  No matter what method you use, in the end it is your responsibility to make sure your handouts are there for your use - **confirm with your contact that all materials have arrived and will be available at your session.**

- **Overheads/Lesson Plans:** Never mail your overheads/lesson plans, or rely on electronic transmission and/or other persons to prepare them for you. Always bring them with you. If you are flying, include them in your carry-on luggage (suitcases may not arrive with you).

FACILITY CHECKLIST

The facility you choose to conduct your training session can contribute significantly to the effectiveness of your session. In-house facilities are usually convenient and are at a low cost or no cost.

If you are delivering your training session out of town, it is best to ask the individual you are coordinating with, where the most convenient facility is located.

The physical comfort of the participants is also an important consideration. For the workshops it is best to have chairs with cushions and tables for writing. Heating, cooling, ventilation and lighting need to be adequate.

The ideal arrangement for the workshop is tables (either round or square) so participants can talk with each other and work in small groups.

Meeting Room Checklist

Is the room large enough to accommodate the participants?	
Is there a screen, overhead projector and flip chart available?	
Is there a TV and VCR available?	
Can all participants see the overheads?	
Do all participants have a table to write at?	
Are the chairs comfortable for the three hours?	
Is the location of the facility convenient for all participants?	
Do you require disability access?	
Are there sufficient electrical outlets and cords?	
Are the washroom facilities easily accessible?	
Is there a coffee location accessible?	

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PREPARING FOR THE PRESENTATION

You must ensure that you are comfortable with the material well in advance of the workshop. If possible visit the facility location prior to your training session to familiarize yourself with the layout of the room.

Pre-Presentation Checklist

Familiarize yourself with the material	
Identify and prepare any additional overheads you may wish to use	
Identify, prepare and/or copy participants handouts	
Prepare any pre-made flip charts	
Ensure that you have enough participants copies	
Make sure that the participant materials are accurate and complete	
Ensure you know your contact at the facility in case any problems arise	
Is the room set up to your satisfaction	
Have extra transparencies available	
Have extra paper and pens available for participants	

Notifying Participants and Registration

You will need to identify your target group in advance and decide how to invite them to the session. It is best to give the participants plenty of advance notice of the training session. You will need to:

1. send a notice to all participants in advance to notify them of the date, time and location of the session
2. confirm their attendance at least 1 week in advance (sometimes a session is planned within a week, however, this is a rare occurrence)

It is important to keep a master list of all participants. You will need their name and work location.

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PRESENTATION CHECKLIST

Title of Course: ____

Facilitator: ____

Date:__________________________ Time:____________________

Location:____

Number of Participants: Minimum:_________ Maximum:_________

Facility:

Participant tables _____________
Facilitator table_______________
Location sign ________________
VCR/TV ____________________
Flip chart ___________________
Overhead Projector____________
Masking tape ________________
Participants pkgs _____________

Supplies:

Tent cards _______________
Participant list ____________
Pens: ball point___________
dry erase ___________
overhead ___________
Writing paper _____________

Handouts: _________________
(mailed ahead?)

Videos: __________________

Facility booked:________________Date:_______________Contact:__________________

Participants notified:___________________________Date:_________________________

Travel arrangements made:_____________________ Date:__________________________

TRAINING FACILITIES LISTING

Victoria/Vancouver

For users of MS Exchange, there are listings of all training rooms currently available in Victoria and Vancouver. To access these lists, contact your local help desk, and ask for the addresses of meeting rooms for your Ministry/Public Body.

Province-wide Resources

Finding suitable training facilities in other areas of the Province can be challenging sometimes. The facilitator's first line of contact will be with the Ministry office in the area in which training is to be provided. It is always preferable to coordinate the booking of a training room with someone who is local and knows the facilities. Make sure that all the items in the **Facilities Checklist** have been covered prior to your arrival and don't be shy about insisting that the room be set-up or equipped the way you need it, as you will have precious little time to take care of these details when you arrive. The contact you establish for booking the training facility/room should also be the person you use if you need to mail any course materials ahead of time.

Remember: the final responsibility for the facility rests with the facilitator - be sure of your room well in advance of the session.

If you cannot find suitable training facilities through your own Ministry, check to see if the area you are training in has a **Health Unit**. Health Unit's almost always have an excellent training facility and are available, depending on demand, to all government employees who wish to use them.