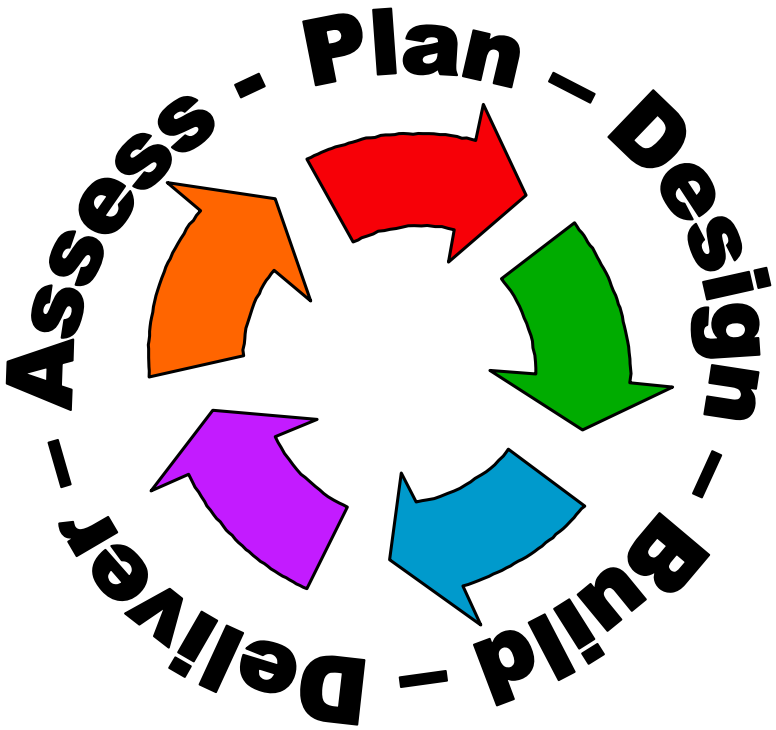
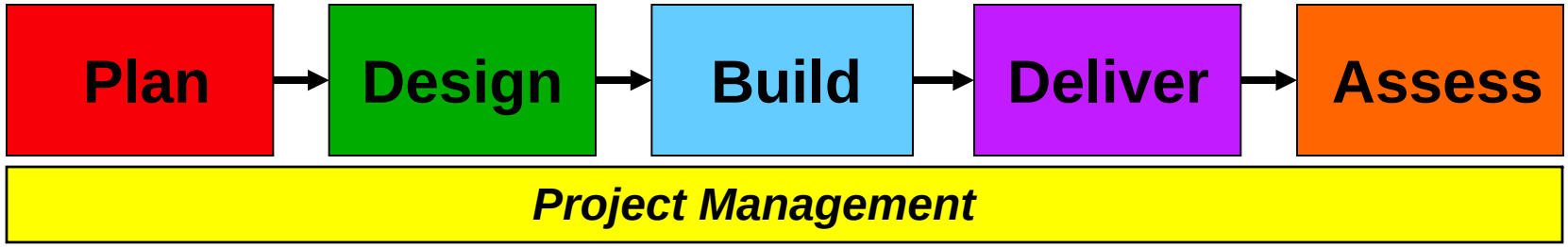
Training Development and Delivery Process



The Training Development & Delivery Process



The training development and delivery process provides a flexible framework for creating training programs within FSA. It establishes a standard method to assist teams involved in this effort. The process is comprised of phases, major deliverables, and specific tasks.

The phases are:

1.	**Plan:**	Identify training needs and create high-level plans for the project
2.	**Design:**	Draft plans to prepare for the development and testing of training materials
3.	**Build:**	Produce, review, and test training materials
4.	**Deliver:**	Conduct training sessions
5.	**Assess:**	Determine if the course is effective and efficient

Project Management: *Oversee project communication, tasks, and deliverables*

Training Process Checklist

Training Process Checklist

07-14-2003

Phase	Major Deliverables	Tasks	Estimated Due Date	✓
Plan	Training Needs Assessment	Receive training request form		
		Conduct audience analysis		
	Training Plan	Identify learning objectives		
		Identify content scope		
		Determine delivery strategy		
		Identify stakeholders		
		Identify logistics strategy		
	Project Plan	Create workplan (tasks, deliverable schedule, check-in points)		
		Develop budget		
		Identify roles (role map)		
		Create task order		
	Project Management	CONDUCT KICK-OFF MEETING		
		Oversee project communication, tasks, and deliverables (+ sponsor sign-off)		
Design	Instructional Design Plan	Create content outline		
		Conduct SME/customer review of content outline		
		Conduct instructional strategy session (create storyboards and activities)		
		Conduct stakeholder review of storyboards		
	Evaluation Strategy	Plan evaluation/measurement tools & methods (dry run, pilot, course, TOT)		
	Project Management	CONDUCT INSTRUCTIONAL STRATEGY SESSION		
		Update workplan		
		Review and update logistics checklist		
		Create communication plan		
		Oversee project communication, tasks, and deliverables (+ sponsor sign-off)		
Build	Course Materials	Create detailed course content		
		Create instructor/facilitator materials (guide, slide presentation, etc.)		
		Create participant material (guide, artifacts, etc.)		
		* Create online training materials		
		Create media (video, graphics, audio, animation)		
		Build help/performance support processes (help desk, job aids, etc.)		
	Evaluation/Measurement	Develop evaluation/measurement tools & methods (for pilot/course)		
	Testing	SUBMIT DRAFT OF MATERIALS (FOR SME REVIEW)		
		PLAN & CONDUCT DRY RUN		
		* Plan & conduct dev/system tests (online)		
		PLAN & CONDUCT PILOT		
	Training of Trainers (TOT)	Develop TOT course (structure, content, materials, logistics)		
		Create trainer toolkit		
		Create TOT evaluation		
	Training Logistics	Solicit and select trainers		
		Select sites and schedule trainers		
		SUBMIT TRAINING ANNOUNCEMENT TO FSAU COMMUNICATIONS		
		ENTER TRAINING/WORKSHOP DATA INTO THE LMS		
		ADVERTISE TRAINING PROGRAM (PUBLISH TRAINING ANNOUCEMENT)		
		SUBMIT CAMERA-READY COPY OF MATERIALS		
		Package materials (printing & shipping)		
	Project Management	Create training maintenance plan		
		Oversee project communication, tasks, and deliverables (+ sponsor sign-off)		
Deliver	Training of Trainers (TOT)	CONDUCT TRAINING OF TRAINER (TOT) SESSION(S)		
		Collect and submit TOT evaluations		
	Logistics Support	Provide logistics support		
		Conduct registration		
	Ongoing Training	DELIVER TRAINING		
		Conduct trainer and trainee evaluations		
		Submit training evaluations to FSAU		
		Provide ongoing support		
	Project Management	Implement training maintenance plan		
		Oversee project communication, tasks, and deliverables		
Assess	Evaluation & Analysis	Collect training evaluations (trainer and participant evaluations)		
		Analyze evaluation/measurement results		
		Summarize evaluation/measurement results		
		Submit final report: Make recommendations/create action plans		
	Celebration & Lessons Learned	Conduct lessons learned sessions with development team(s)		
		Conduct celebration session		
		Document lessons learned		
	Project Management	Oversee project communication, tasks, and deliverables		

PLAN

DESIGN

BUILD

DELIVER

ASSESS

Major Deliverables

- Training needs assessment
- Training plan
- Project plan

- Instructional design plan
- Evaluation strategy

- Course materials
- Evaluation/ Measurement
- Testing
- Training of trainers
- Training logistics

- Training of trainers
- Logistics support
- Ongoing training

- Evaluation & Analysis
- Celebration & Lessons Learned

Plan Phase

Training Process Checklist

Phase	Major Deliverables	Tasks	Estimated Due Date	✓
Plan	Training Needs Assessment	Receive training request form		
		Conduct audience analysis		
	Training Plan	Identify learning objectives		
		Identify content scope		
		Determine delivery strategy		
		Identify stakeholders		
		Identify logistics strategy		
	Project Plan	Create workplan (tasks, deliverable schedule, check-in points)		
		Develop budget		
		Identify roles (role map)		
		Create task order		
	Project Management	CONDUCT KICK-OFF MEETING		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Design	Instructional Design Plan	Create content outline		
		Conduct SME/customer review of content outline		
		Conduct instructional strategy session (create storyboards and activities)		
		Conduct stakeholder review of storyboards		
	Evaluation Strategy	Plan evaluation/measurement tools & methods (dry run, pilot, course, TOT)		
	Project Management	CONDUCT INSTRUCTIONAL STRATEGY SESSION		
		Update workplan		
		Review and update logistics checklist		
		Create communication plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Build	Course Materials	Create detailed course content		
		Create instructor/facilitator materials (guide, slide presentation, etc.)		
		Create participant material (guide, artifacts, etc.)		
		* Create online training materials		
		Create media (video, graphics, audio, animation)		
		Build help/performance support processes (help desk, job aids, etc.)		
	Evaluation/Measurement	Develop evaluation/measurement tools & methods (for pilot/course)		
	Testing	SUBMIT DRAFT OF MATERIALS (FOR SME REVIEW)		
		PLAN & CONDUCT DRY RUN		
		* Plan & conduct dev/system tests if online		
		PLAN & CONDUCT PILOT		
	Training of Trainers (TOT)	Develop TOT course (structure, content, materials, logistics)		
		Create trainer toolkit		
		Create TOT evaluation		
	Training Logistics	Solicit and select trainers		
		Select sites and schedule trainers		
		SUBMIT TRAINING ANNOUNCEMENT TO FSAU COMMUNICATIONS		
		ENTER TRAINING WORKSHOP DATA INTO THE LMS		
		ADVERTISE TRAINING PROGRAM (PUBLISH TRAINING ANNOUCEMENT)		
		SUBMIT CAMERA-READY COPY OF MATERIALS		
		Package materials (printing & shipping)		
	Project Management	Create training maintenance plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Deliver	Training of Trainers (TOT)	CONDUCT TRAINING OF TRAINER (TOT) SESSION(S)		
		Collect and submit TOT evaluations		
	Logistics Support	Provide logistics support		
		Conduct registration		
	Ongoing Training	DELIVER TRAINING		
		Conduct trainer and trainee evaluations		
		Submit training evaluations to FSAU		
		Provide ongoing support		
	Project Management	Implement training maintenance plan		
		Oversee project communication, tasks, and deliverables		
Assess	Evaluation & Analysis	Collect training evaluations (trainer and participant evaluations)		
		Analyze evaluation/measurement results		
		Summarize evaluation/measurement results		
		Submit final report: Make recommendations/create action plans		
	Celebration & Lessons Learned	Conduct lessons learned sessions with development team(s)		
		Conduct celebration session		
		Document lessons learned		
	Project Management	Oversee project communication, tasks, and deliverables		

Major Deliverables:

- Training needs assessment
- Training plan
- Project plan

Purpose of the *PLAN* phase:

- Identify the business reason for conducting the course
- Determine the individuals/groups who need to take the course
- Define the specific topics to be addressed in the course
- Determine delivery method for delivering training
- Acknowledge what participants will be able to do after taking the course

Training Request Form

Training Request Form

Proposed course name			
Sponsor(s)		Primary contact(s)	
Contact phone number		Date submitted	

Please answer the following questions to formally initiate the design & development of the requested program.

Question	Please enter your response in this column
1. What is the training about? Please provide a brief description of the training program, including specific course topics.	
2. Why is the training needed? Explain the reason for conducting this training program.	
3. What are the intended outcomes? Describe what you want participants to learn in the course. What would make this program successful?	
4. Who is the target audience? List customer groups for whom the training is intended. This includes school type and job function.	
5. Who are the stakeholders? List individuals and groups affected by the training, within FSA. Examples include key reviewers, sponsors, channel representatives, etc.	
6. Who are the content experts? List individuals who will provide subject matter expertise during development of this course.	
7. Requested timeframe When should the training program be deployed? What are the delivery constraints or requirements?	
8. Additional comments Please note any additional comments or requests related to this training.	

Purpose of the *Training Request Form*:

- Brief description of the training
- Define the training need
- Define the intended outcomes
- Determine target audience
- Identify stakeholders
- Identify subject matter experts (SME)
- Determine timeframe

Training Workplan Template

<Project Name> Training Workplan Template

ID	Task	Responsible	Dates		Milestone Y/N	Comments/Status
			Start	Finish		
Plan						
1.	Conduct training needs assessment (Visualize)					
2.	Receive/complete training request form					
3.	Conduct audience analysis					
4.	Create training plan (Determine elements of project's vision and scope)					
5.	Identify learning objects					
6.	Identify content scope					
7.	Determine delivery strategy					
8.	Determine project plan (Define and prioritize performance factors; cost, time, quality, scope)					
9.	Receive baseline budget					
10.	Create workplan, Identify milestones					
11.	Identify roles (role map)					
12.	Identify stakeholders and create communication plan					
13.	Identify logistics strategy					
14.	Develop budget and create task order					
15.	Project management					
16.	Conduct kick-off meeting					
17.	Oversee project communication, tasks, and deliverables					
18.	Submit status reports					

Purpose of the *Training Workplan:*

- Serves as a roadmap for the project
- Defines the schedule
- Assigns tasks and due dates
- Confirms steps are completed as planned
- Monitors the work effort
- Identifies issues to be communicated with stakeholders

Role Map Template

Plan
Project Plan

Role Map Template

	Role	Responsibilities	Time Commitment	Who/How Many
Leadership	Project Sponsor	▪ Set strategic direction ▪ Control funding ▪ Approve recommendations		
	Project Manager	▪ Oversee project and monitor team work ▪ Review/approve recommendations and task order		
Project Team	Team Lead	▪ Establish and support team ▪ Assist in planning, designing, building, delivering, and assessing ▪ Monitor work ▪ Review deliverables		
	Development Team	▪ Assist in planning, designing, building, and assessing the training course		
	Instructional Designer	▪ Assist in designing and building the trainer/training materials and help/support processes		
	Trainers	▪ Assist in delivering and assessing the trainer/training materials and help/support processes		
SME	Subject Matter Expert (SME)	▪ Provide content to project team ▪ Review materials		
	Target User	▪ Participate in dry run/pilot tests ▪ Attend and evaluate training		
Support	Finance Lead	▪ Provide baseline budget for course ▪ Monitor projected training costs ▪ Collect and analyze actual training cost data		
	COR	▪ Create, review, and award task order		
	SME Support	▪ Manage SME involvement		
	Communications	▪ Create & deliver communication plan ▪ Conduct ongoing communications ▪ Advertise training		

Purpose of the *Role Map:*

- Identifies responsibilities for each role
- Identities relationships between roles
- Time commitment required for each role
- Identifies primary resources to complete the project

Logistical Checklist

Logistical Checklist for Workshops
Material/Equipment Request Form

Course Information	
Course Name:	Training Dates:
Course Contact:	Telephone/Email:
Need Logistics Coordinator (LC)? YES ☐ NO ☐	Level 1 ☐ Level 2 ☐ Level 3 ☐
Logistics Contact:	Telephone/Email:
Please check appropriate for training course: Hotel ☐ RTF ☐ School ☐ UCP ☐ Other ☐	
Tables- (style, number, seating at each)	
Number of Break-out rooms needed:	
Will a contractor secure sites? YES ☐ NO ☐ If yes, please list site contact info and provide a copy of contract to LC. If no, LC will fill in site info.	

Materials Needed						
Do you need:	YES	NO	How Many?	Do you need:	YES	NO
Participant Guides to be photocopied by FSAU? Mailed to_____ By what date? _____				Roster		
Tape				Certificates		
Posters				Name Tags		
Notebook				Tent Cards		
Tabs for Notebooks				Sign-in Sheets		
Direction Signs				Evaluations		
Easel for Signs						

Other:

Equipment Needed					
Do you need:	YES	NO	Do you need:	YES	NO
Lavalieres			VCR-TV with Cart		
Hand-held Mike			Screen(s)		
Sound System/Mixer			Easel/Flip Chart/Markers		
LCD Projector/with Cart			CD Player		
Laptop			Podium		
Computers			Overhead Projector		
VHS Camcorder and Tapes			Powerstrip w/Outlets & Ext. Cords		
Is someone bringing an LCD Projector/Laptop with him or her? If No, request set-up from FSAU/Hotel/School					

Other:

Purpose of the *Logistical Checklist*:

- Secure site locations
- Identify and locate needed equipment
- Identify and locate needed materials
- Register participants
- Ship and mail training materials
- Identify POC for all logistical matters

Design Phase

Training Process Checklist

Phase	Major Deliverables	Task	Estimated Due Date	✓
Plan	Training Needs Assessment	Receive training request form		
		Conduct audience analysis		
	Training Plan	Identify learning objectives		
		Identify content scope		
		Determine delivery strategy		
		Identify stakeholders		
		Identify logistics strategy		
	Project Plan	Create workplan (tasks, deliverable schedule, check-in points)		
		Develop budget		
		Identify roles (role map)		
		Create task order		
	Project Management	CONDUCT KICK-OFF MEETING		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Design	Instructional Design Plan	Create content outline		
		Conduct SME/customer review of content outline		
		Conduct instructional strategy session (create storyboards and activities)		
		Conduct stakeholder review of storyboards		
	Evaluation Strategy	Plan evaluation/measurement tools & methods (dry run, pilot, course, TOT)		
	Project Management	CONDUCT INSTRUCTIONAL STRATEGY SESSION		
		Update workplan		
		Review and update logistics checklist		
		Create communication plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Build	Course Materials	Create detailed course content		
		Create instructor/facilitator materials (guide, slide presentation, etc.)		
		Create participant material (guide, artifacts, etc.)		
		* Create online training materials		
		Create media (video, graphics, audio, animation)		
		Build help/performance support processes (help desk, job aids, etc.)		
	Evaluation/Measurement	Develop evaluation/measurement tools & methods (for pilot/course)		
	Testing	SUBMIT DRAFT OF MATERIALS (FOR SME REVIEW)		
		PLAN & CONDUCT DRY RUN		
		* Plan & conduct dev/system tests (online)		
		PLAN & CONDUCT PILOT		
	Training of Trainers (TOT)	Develop TOT course (structure, content, materials, logistics)		
		Create trainer toolkit		
		Create TOT evaluation		
	Training Logistics	Solicit and select trainers		
		Select sites and schedule trainers		
		SUBMIT TRAINING ANNOUNCEMENT TO FSAU COMMUNICATIONS		
		ENTER TRAINING/WORKSHOP DATA INTO THE LMS		
		ADVERTISE TRAINING PROGRAM (PUBLISH TRAINING ANNOUCEMENT)		
		SUBMIT CAMERA-READY COPY OF MATERIALS		
		Package materials (printing & shipping)		
	Project Management	Create training maintenance plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Deliver	Training of Trainers (TOT)	CONDUCT TRAINING OF TRAINER (TOT) SESSION(S)		
		Collect and submit TOT evaluations		
	Logistics Support	Provide logistics support		
		Conduct registration		
	Ongoing Training	DELIVER TRAINING		
		Conduct trainer and trainee evaluations		
		Submit training evaluations to FSAU		
		Provide ongoing support		
	Project Management	Implement training maintenance plan		
		Oversee project communication, tasks, and deliverables		
Assess	Evaluation & Analysis	Collect training evaluations (trainer and participant evaluations)		
		Analyze evaluation/measurement results		
		Summarize evaluation/measurement results		
	Celebration & Lessons Learned	Submit final report: Make recommendations/create action plans		
		Conduct lessons learned sessions with development team(s)		
		Conduct celebration session		
		Document lessons learned		
	Project Management	Oversee project communication, tasks, and deliverables		

Major Deliverables:

- Instructional design plan
- Evaluation strategy

Purpose of the *DESIGN* phase:

- Builds on the content scope and learning objectives and creates the course content and methods
- Appropriate instructional strategies and activities are defined
- Delivery approach is determined
- Reviews are conducted to validate the instructional design

Build Phase

Training Process Checklist

Phase	Major Deliverables	Task	Estimated Due Date	✓
Plan	Training Needs Assessment	Receive training request form		
		Conduct audience analysis		
	Training Plan	Identify learning objectives		
		Identify content scope		
		Determine delivery strategy		
		Identify stakeholders		
		Identify logistics strategy		
	Project Plan	Create workplan (tasks, deliverable schedule, check-in points)		
		Develop budget		
		Identify roles (role map)		
		Create task order		
	Project Management	CONDUCT KICK-OFF MEETING		
		Oversee project communication, tasks, and deliverables (+ sponsor sign-off)		
Design	Instructional Design Plan	Create content outline		
		Conduct SME/customer review of content outline		
		Conduct instructional strategy session (create storyboards and activities)		
		Conduct stakeholder review of storyboards		
	Evaluation Strategy	Plan evaluation/measurement tools & methods (dry run, pilot, course, TOT)		
	Project Management	CONDUCT INSTRUCTIONAL STRATEGY SESSION		
		Update workplan		
		Review and update logistics checklist		
		Create communication plan		
		Oversee project communication, tasks, and deliverables (+ sponsor sign-off)		
Build	Course Materials	Create detailed course content		
		Create instruction/facilitator materials (guide, slide presentation, etc.)		
		Create participant material (guide, artifacts, etc.)		
		* Create online training materials		
		Create media (video, graphics, audio, animation)		
		Build help/performance support processes (help desk, job aids, etc.)		
	Evaluation/Measurement	Develop evaluation/measurement tools & methods (for pilot/course)		
	Testing	SUBMIT DRAFT OF MATERIALS (FOR SME REVIEW)		
		PLAN & CONDUCT DRY RUN		
		* Plan & conduct dev/system tests (online)		
		PLAN & CONDUCT PILOT		
	Training of Trainers (TOT)	Develop TOT course (structure, content, materials, logistics)		
		Create trainer toolkit		
		Create TOT evaluation		
	Training Logistics	Solicit and select trainers		
		Select sites and schedule trainers		
		SUBMIT TRAINING ANNOUNCEMENT TO FSAU COMMUNICATIONS		
		ENTER TRAINING/WORKSHOP DATA INTO THE LMS		
		ADVERTISE TRAINING PROGRAM (PUBLISH TRAINING ANNOUCEMENT)		
		SUBMIT CAMERA-READY COPY OF MATERIALS		
		Package materials (printing & shipping)		
	Project Management	Create training maintenance plan		
		Oversee project communication, tasks, and deliverables (+ sponsor sign-off)		
Deliver	Training of Trainers (TOT)	CONDUCT TRAINING OF TRAINER (TOT) SESSION(S)		
		Collect and submit TOT evaluations		
	Logistics Support	Provide logistics support		
		Conduct registration		
	Ongoing Training	DELIVER TRAINING		
		Conduct trainer and trainee evaluations		
		Submit training evaluations to FSAU		
		Provide ongoing support		
	Project Management	Implement training maintenance plan		
		Oversee project communication, tasks, and deliverables		
Assess	Evaluation & Analysis	Collect training evaluations (trainer and participant evaluations)		
		Analyze evaluation/measurement results		
		Summarize evaluation/measurement results		
	Celebration & Lessons Learned	Submit final report: Make recommendations/create action plans		
		Conduct lessons learned sessions with development team(s)		
		Conduct celebration session		
		Document lessons learned		
	Project Management	Oversee project communication, tasks, and deliverables		

Major Deliverables:

- Course materials
- Evaluation/ Measurement
- Testing
- Training of trainers
- Training logistics

Purpose of the *BUILD* phase:

- Communication and marketing approaches are developed and implemented
- Participant, instructor, media, and support materials are created
- Evaluations are developed for the dry run, pilot, TOT, and training course
- The dry run and pilot are completed
- Camera ready course materials are sent to the printer

Training Sites and Training Schedule Template

Training Sites and Training Schedule Template

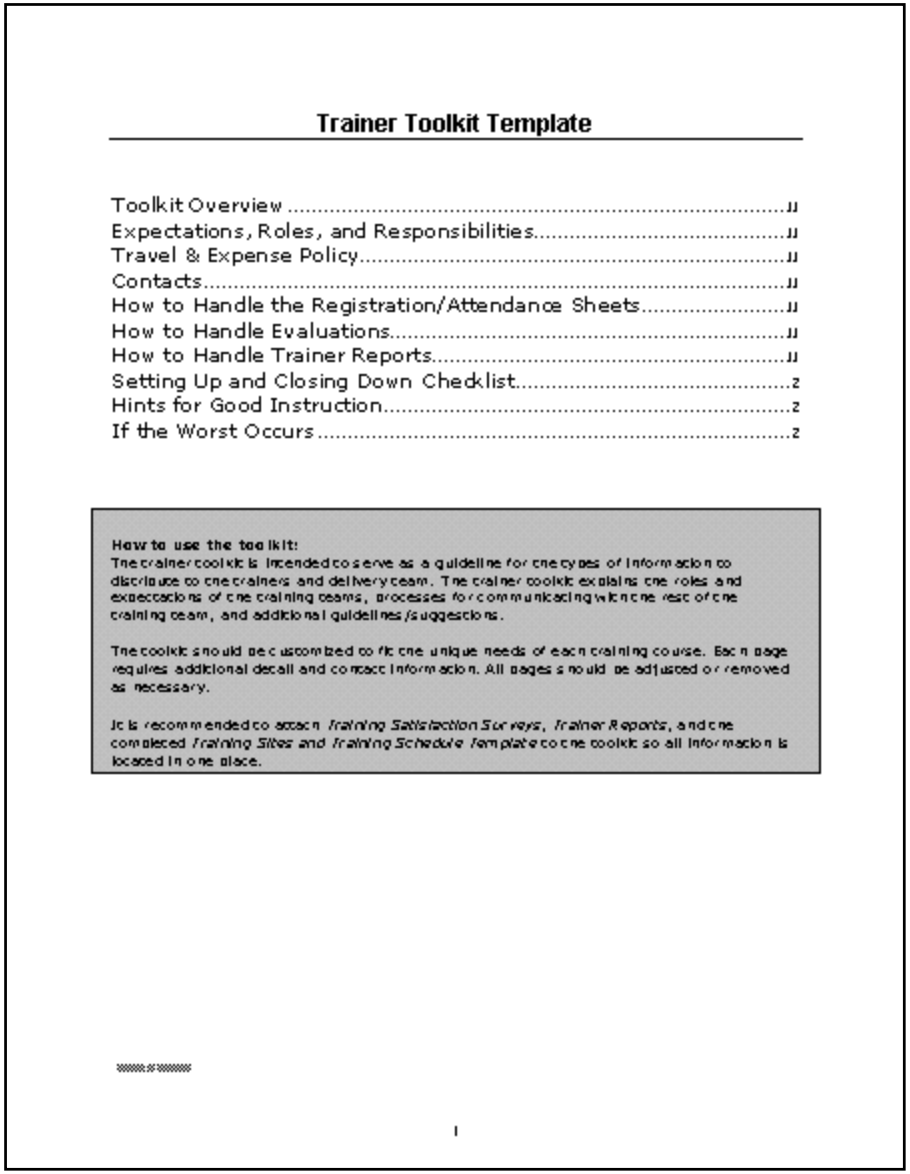
Course Name:

Date	Region	Name of Training site	Address of Training Site	Trainer Name(s)	Alternate Trainer	Shipping Address and Contact (If Different from Site)	Special Requirements /Notes

Purpose of the *Training Sites and Training Schedule*:

- Solicit and select trainers
- Select sites and schedule trainers
- Identify alternate trainers
- Identify address for shipping needs
- Acknowledge any special requirements

Trainer Toolkit



Trainer Toolkit Template

Toolkit Overview ii
Expectations, Roles, and Responsibilities ii
Travel & Expense Policy ii
Contacts ii
How to Handle the Registration/Attendance Sheets ii
How to Handle Evaluations ii
How to Handle Trainer Reports ii
Setting Up and Closing Down Checklist 2
Hints for Good Instruction 2
If the Worst Occurs 2

How to use the toolkit:
The trainer toolkit is intended to serve as a guideline for the types of information to distribute to the trainers and delivery team. The trainer toolkit explains the roles and expectations of the training teams, processes for communicating with the rest of the training team, and additional guidelines/suggestions.

The toolkit should be customized to fit the unique needs of each training course. Each page requires additional detail and contact information. All pages should be adjusted or removed as necessary.

It is recommended to attach *Training Satisfaction Surveys*, *Trainer Reports*, and the completed *Training Sites* and *Training Schedule Template* to the toolkit so all information is located in one place.

Purpose of the *Trainer Toolkit*:

- Explains the roles and expectations of the training teams
- Identifies the process for communicating with the rest of the training team
- Offers additional guidelines/suggestions for the trainers
- Provides hints for good instruction
- Procedures for setting up and closing down the training session
- How to handle evaluations

Deliver Phase

Training Process Checklist

Phase	Major Deliverables	Task	Estimated Due Date	✓
Plan	Training Needs Assessment	Receive training request form		
		Conduct audience analysis		
	Training Plan	Identify learning objectives		
		Identify content scope		
		Determine delivery strategy		
		Identify stakeholders		
		Identify logistics strategy		
	Project Plan	Create workplan (tasks, deliverable schedule, check-in points)		
		Develop budget		
		Identify roles (role map)		
		Create task order		
	Project Management	CONDUCT KICK-OFF MEETING		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Design	Instructional Design Plan	Create content outline		
		Conduct SME/customer review of content outline		
		Conduct instructional strategy session (create storyboards and activities)		
		Conduct stakeholder review of storyboards		
	Evaluation Strategy	Plan evaluation/measurement tools & methods (dry run, pilot, course, TOT)		
	Project Management	CONDUCT INSTRUCTIONAL STRATEGY SESSION		
		Update workplan		
		Review and update logistics checklist		
		Create communication plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Build	Course Materials	Create detailed course content		
		Create instructor/facilitator materials (guide, slide presentation, etc.)		
		Create participant material (guide, artifacts, etc.)		
		* Create online training materials		
		Create media (video, graphics, audio, animation)		
		Build help/performance support processes (help desk, job aids, etc.)		
	Evaluation/Measurement	Develop evaluation/measurement tools & methods (for pilot/course)		
	Testing	SUBMIT DRAFT OF MATERIALS (FOR SME REVIEW)		
		PLAN & CONDUCT DRY RUN		
		* Plan & conduct dev/system tests (online)		
		PLAN & CONDUCT PILOT		
	Training of Trainers (TOT)	Develop TOT course (structure, content, materials, logistics)		
		Create trainer toolkit		
		Create TOT evaluation		
	Training Logistics	Solicit and select trainers		
		Select sites and schedule trainers		
		SUBMIT TRAINING ANNOUNCEMENT TO FSAU COMMUNICATIONS		
		ENTER TRAINING/WORKSHOP DATA INTO THE LMS		
		ADVERTISE TRAINING PROGRAM (PUBLISH TRAINING ANNOUCEMENT)		
		SUBMIT CAMERA-READY COPY OF MATERIALS		
		Package materials (printing & shipping)		
	Project Management	Create training maintenance plan		
Deliver	Training of Trainers (TOT)	CONDUCT TRAINING OF TRAINER (TOT) SESSION(S)		
		Collect and submit TOT evaluations		
	Logistics Support	Provide logistics support		
		Conduct registration		
	Ongoing Training	DELIVER TRAINING		
		Conduct trainer and trainee evaluations		
		Submit training evaluations to FSAU		
		Provide ongoing support		
	Project Management	Implement training maintenance plan		
Assess	Evaluation & Analysis	Collect training evaluations (trainer and participant evaluations)		
		Analyze evaluation/measurement results		
		Summarize evaluation/measurement results		
		Submit final report: Make recommendations/create action plans		
	Celebration & Lessons Learned	Conduct lessons learned sessions with development team(s)		
		Conduct celebration session		
		Document lessons learned		
	Project Management	Oversee project communication, tasks, and deliverables		

Major Deliverables:

- Training of trainers
- Logistics support
- Ongoing training

Purpose of the *DELIVER* phase:

- Deliver the Training of Trainers course
- Logistics representatives support training needs
- Trainers deliver the training course
- Participant evaluations are distributed and collected
- Training maintenance plan is implemented

Trainer Report

Trainer Report – Course Session

Please refer to the Trainer Toolkit for details on submission of this document and its accompanying Training Satisfaction Survey and Registration/Attendance Sheet

Workshop title:			
Location:		Date(s):	
Trainer(s):			
# of participants registered (LMS)		# of participants attending	
# of walk-ins		# of Training Satisfaction Surveys	
# of no-shows			

Please rank the following items on the scale of 1-6 by circling the appropriate number.

		Strongly disagree	Disagree	Neutral	Agree	Strongly agree	
1	Participants met the audience criteria identified in the training announcement.	1	2	3	4	5	N/A
2	The training space was appropriate for this training program.	1	2	3	4	5	N/A
3	The exercises and activities were appropriate for this audience.	1	2	3	4	5	N/A
4	Audience reaction to the training class was positive.	1	2	3	4	5	N/A
5	This class session achieved the goals of the training program.	1	2	3	4	5	N/A

Please provide comments on the following:

6	What additional topics (beyond the scope of course) did participants address/discuss?
7	What recommendations do you have for additional training topics, based on this session?
8	Which activity was most successful?
9	Which activity was least successful?
10	Other comments on the course session (including comments on questions #1-5):

Purpose of the *Training Report*:

- Documents number of attendees
- Documents number of evaluations received
- Documents site feedback
- Documents trainer feedback, suggestions, and recommendations
- Documents any special circumstances that occurred during the training session

Assess Phase

Training Process Checklist

07-14-2003

Phase	Major Deliverables	Tasks	Estimated Due Date	✓
Plan	Training Needs Assessment	Receive training request form		
		Conduct audience analysis		
	Training Plan	Identify learning objectives		
		Identify content scope		
		Determine delivery strategy		
		Identify stakeholders		
		Identify logistics strategy		
	Project Plan	Create workplan (tasks, deliverable schedule, check-in points)		
		Develop budget		
		Identify roles (role map)		
		Create task order		
	Project Management	CONDUCT KICK-OFF MEETING		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Design	Instructional Design Plan	Create content outline		
		Conduct SME/customer review of content outline		
		Conduct instructional strategy session (create storyboards and activities)		
		Conduct stakeholder review of storyboards		
	Evaluation Strategy	Plan evaluation/measurement tools & methods (dry run, pilot, course, TOT)		
	Project Management	CONDUCT INSTRUCTIONAL STRATEGY SESSION		
		Update workplan		
		Review and update logistics checklist		
		Create communication plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Build	Course Materials	Create detailed course content		
		Create instruction/facilitator materials (guide, slide presentation, etc.)		
		Create participant material (guide, artifacts, etc.)		
		* Create online training materials		
		Create media (video, graphics, audio, animation)		
		Build help/performance support processes (help desk, job aids, etc.)		
	Evaluation/Measurement	Develop evaluation/measurement tools & methods (for pilot/course)		
	Testing	SUBMIT DRAFT OF MATERIALS (FOR SME REVIEW)		
		PLAN & CONDUCT DRY RUN		
		* Plan & conduct dev/system tests (online		
		PLAN & CONDUCT PILOT		
	Training of Trainers (TOT)	Develop TOT course (structure, content, materials, logistics)		
		Create trainer toolkit		
		Create TOT evaluation		
	Training Logistics	Solicit and select trainers		
		Select sites and schedule trainers		
		SUBMIT TRAINING ANNOUNCEMENT TO FSAU COMMUNICATIONS		
		ENTER TRAINING/WORKSHOP DATA INTO THE LMS		
		ADVERTISE TRAINING PROGRAM (PUBLISH TRAINING ANNOUCEMENT)		
		SUBMIT CAMERA-READY COPY OF MATERIALS		
		Package materials (printing & shipping)		
	Project Management	Create training maintenance plan		
		Oversee project communication, tasks, and deliverables [+ sponsor sign-off]		
Deliver	Training of Trainers (TOT)	CONDUCT TRAINING OF TRAINER (TOT) SESSION(S)		
		Collect and submit TOT evaluations		
	Logistics Support	Provide logistics support		
		Conduct registration		
	Ongoing Training	DELIVER TRAINING		
		Conduct trainer and trainee evaluations		
		Submit training evaluations to FSAU		
		Provide ongoing support		
	Project Management	Implement training maintenance plan		
		[illegible]		
Assess	Evaluation & Analysis	Collect training evaluations (trainer and participant evaluations)		
		Analyze evaluation/measurement results		
		Summarize evaluation/measurement results		
		Submit final report: Make recommendations/create action plans		
	Celebration & Lessons Learned	Conduct lessons learned sessions with development team(s)		
		Conduct celebration session		
		Document lessons learned		
	Project Management	Oversee project communication, tasks, and deliverables		

Major Deliverables:

- Evaluation & Analysis
- Celebration & Lessons Learned

Purpose of the *ASSESS* phase:

- Training evaluations are submitted to FSAU
- Training evaluations are summarized and assessed
- Final report is created based on training course recommendations
- Celebrate the completion of the training course by acknowledging contributions, lessons learned, and successes

Benefits of the Process

Team approach

- ❑ Seek input from key stakeholders, subject matter experts, and others affected by the project
- ❑ Ensure that teams reflect various groups, with representatives from different channels and operating partners working side-by-side

Project planning

- ❑ Gather channel managers and FSAU representatives to plan training for the year ahead
- ❑ Require sign-offs at the end of each phase before the next phase begins
- ❑ Utilize tools to enable successful planning
  - Training request form
  - Stakeholder analysis
  - Communication plan

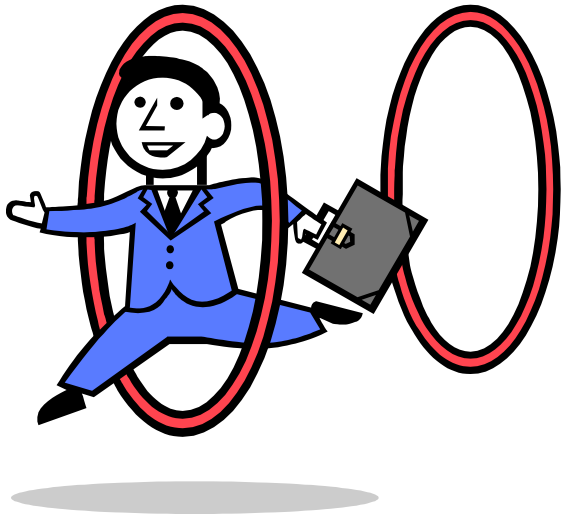
Defined roles & responsibilities

- ❑ Determine whose staff is responsible for which tasks
  - Role map
- ❑ Encourage resource management to limit workload imbalances

Logistics support

- ❑ Plan logistics strategy to best meet the needs of the development team and trainers
- ❑ Assign a point of contact to each team to manage logistical elements, such as printing and shipping
- ❑ Assure that materials and logistical arrangements are prepared and delivered prior to training

The Goals of the Training Process



Working together, we achieve FSA's goal to develop training that is:

Relevant:	Stakeholders and subject matter experts help define training needs
Interactive:	Training design that encourages participation and active learning
Engaging:	Professional trainers who capture interest and enhance learning
Polished:	Skilled facilitators who present well planned, designed, and developed materials
Supported:	Established processes and logistical assistance that enables trainers to focus on the task at hand