

Training and Learning Standards
***A checklist and tool for developing and
implementing high-quality training and learning
interventions***

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INTRAEALTH INTERNATIONAL

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IntraHealth International is a leader in supporting the development of an effective health workforce. We are committed to working toward the goal of people everywhere having access to qualified, supplied, and supported health workers who can provide essential health care. High quality training is central to this work.

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INTRODUCTION

Background

IntraHealth has developed its approach to achieving high-quality training and learning interventions based on work in over 50 countries, since the organization was founded in 1979. Growing from our many years of experience, we have developed a number of guidance documents and tools for IntraHealth staff, partners, and others. Many of these tools were developed under the USAID-funded PRIME I and II projects and most recently under the Capacity Project. IntraHealth's Training and Learning Standards draw on all of these resources as well as a number of key tools from other organizations throughout this document. References and links to specific sections of these documents are provided with each standard to assist readers in finding detailed guidance to meet the standards. A compiled list of resources is also included in this document.

What Are the Training and Learning Standards?

The Training and Learning Standards are statements that define the generally accepted practice to ensure the quality of training and learning activities.

Purpose of the Standards

IntraHealth created the Training and Learning Standards to guide those who are responsible for planning, developing, implementing, and evaluating training programs of many types. The standards outline the elements that effective training and learning programs should include and serve as a foundation upon which curricula and programs should be developed, supported, and evaluated.

In some situations, it may not be possible to meet all the standards. In these situations, the standards should still be used to guide the process and evaluate the outcome, recognizing that certain limitations may exist. We believe, and our experience shows, that meeting the standards results in improving the performance of health providers and workers when they are in their workplace and on the job. These are the standards that we work toward, and they define the quality we seek to achieve.

How to Use the Standards

The standards can be used as guidance to ensure the quality of training, including during the following activities:

- Program managers, training and evaluation specialists can use the standards in planning, implementing, and evaluating programs that include training and learning components.

- Course designers and training and evaluation specialists can use the standards in designing, developing, and evaluating curricula, and implementing and evaluating learning interventions.
- Managers can use the standards as a reference when developing job descriptions and setting performance expectations for staff, partners, or consultants.
- Ministries of health and education, health training institutions, professional associations, and other institutions can use the standards as a basis for developing and implementing national training and education policies and strategies.

How to Use the Training and Learning Standards Checklist and the 7 Planning Questions for Training

The checklist is a shortened version of the standards formatted for ease of use in double-checking that the standards have been addressed. It may be especially useful to managers seeking to ensure the quality of interventions, while the fuller standards, with more detailed information and references on meeting each standard, will be more useful to those directly involved in developing and implementing training and learning activities.

The 7 Planning Questions are a program manager's planning aid for training which corresponds to the first few steps of IntraHealth's *Learning for Performance: a guide and toolkit*, a primary reference for the Training and Learning Standards.

Guiding Principles

The following principles guide the application of the Training and Learning Standards.

- **IntraHealth's *Learning for Performance*** (LFP) is an approach used to plan, develop, implement, and evaluate training and learning activities or programs. The Training and Learning Standards are consistent with LFP and help ensure that this approach is conducted in a standardized way.
- **Participant follow-up, including supportive supervision**, is an integral part of each learning intervention that develops skills or competencies. These steps are critical to ensure transfer of learning and bring about the desired performance on the job.
- **Country and program experience** is the basis of the Training and Learning Standards. Users of the document are encouraged to seek opportunities to learn from experience, for example by collecting qualitative and quantitative data on training and learning programs, sharing lessons learned, and building upon what works.

Abbreviations for Documents Used in the Standards

- LFP** *Learning for Performance: a guide and toolkit for health worker training and education programs*
- PI** *Performance Improvement: Stages, Steps and Tools*
- PFT** *Programming for Training: A resource package for trainers, program managers, and supervisors of reproductive health and family planning programs*
- 7PQ** *7 (Seven) Planning Questions for Training*
- TOL** *Transfer of Learning: a guide for strengthening the performance of health care workers*
- TW** *Training Works! What you need to know about managing, designing, delivering and evaluating group-based training*

TRAINING AND LEARNING STANDARDS CHECKLIST

This standards checklist offers a way to rapidly assess whether all steps necessary for planning, implementing, and evaluating a successful training intervention have been achieved.

Instructions: Move through the checklist, ticking off each item that has been addressed. For items that have not been achieved, see the related area in the Training and Learning Standards for more detail on how to achieve these steps.

Area 1: Planning training and learning interventions

- 1. **A performance gap or gaps**, (learning needs) for which the training intervention is to be developed, is/are identified.
- 2. **A learning goal** is written that addresses the gap(s).
- 3. **Best information** available is used for analysis.
- 4. **Stakeholders** are identified and involved.
- 5. **Resources**, adequate to meet the learning goal and address performance gap(s), are identified.
- 6. **Written budget** is developed.
- 7. Information about **learner characteristics** and **work environment** is gathered and used.
- 8. Information about **job responsibilities** and **essential skills and knowledge** is gathered and used.

Area 2: Developing curricula and materials

- 9. **Learning objectives** are based on the essential skills, knowledge, and attitudes. Learning objectives include **performance, conditions, and criteria**.
- 10. An **instructional strategy** is written which outlines the following elements and ties specific elements of training to the objectives.
 - Program description
 - Learning goals and learning objectives
 - Selection criteria for learners
 - Training and learning methods
 - Learning materials
 - Evaluation methods
 - Course duration
 - Suggested course composition (number of learners, trainers, etc.)
 - Training implementation, follow-up and evaluation plans.
- 11. **Curriculum and supporting materials** are related to learning needs and requirements and match the instructional strategy.
- 12. **Stakeholders** are involved to ensure transfer of learning.
- 13. **Copyright, acknowledgements, and logo use** meet requirements.

Area 3: Preparing for implementation of training and learning interventions

- 14. **Logistical arrangements** for the intervention are made in advance, including needed accommodations for trainers and/or learners with disabilities.
- 15. **Learning resources** (printed materials, models, audio-visual equipment, training packages, etc.) are ready for use.
- 16. **A plan for trainer and facilitator** selection and preparation is in place.
- 17. **Mechanisms** are in place to support the **transfer of learning** on the job.
- 18. For **clinical trainings**, adequate caseload, site preparation, preceptors, and trainers are scheduled and arranged.

Area 4: Implementing training and learning interventions

- 19. **Learning resources**, equipment and supplies are available and used for intended purposes.
- 20. **Logistical arrangements** meet trainers' and learners' needs.
- 21. **Technology** required to implement learning intervention is available.
- 22. Learning intervention requires **active engagement** on the part of trainers and learners.
- 23. Both **knowledge and skills are assessed** as planned in the instructional strategy.
- 24. **Skills acquisition** is competency-based.
- 25. All individuals involved in training (**trainers and learners**) **receive feedback**.

Area 5: Following up learners

- 26. A written **follow-up plan** is in place.
- 27. Mechanisms for follow-up are integrated in the **supervision system**.
- 28. **Learners develop action plans** for applying learning on the job.
- 29. Up-to-date **information** and **resources to support job performance** are given.

Area 6. Evaluating training and learning interventions

- 30. A written **evaluation plan** is in place and describes what will be evaluated, how and where, when, who, and resources needed.
- 31. Evaluation shows how the learning intervention has affected **learners' performance**.
- 32. Evaluation reports reflect **program results** that can be used for **decision-making**.

Area 7. Documenting training and learning interventions

- 33. **A system** is used to document and manage information about this training intervention's learners, trainers, learning resources, logistical resources, and training activities.

The Training and Learning Standards

Area 1: Planning Training and Learning Interventions

Aims: To ensure that the performance problem and its causes are clearly defined. To ensure that the problem can be addressed, in some part, through a learning intervention. To ensure that the learning intervention is tailored to the needs of the learner and the learner's work situation. To ensure that the learning intervention is designed to help learners transfer skills and knowledge to the job.

Standard	As evidenced by	Reference on how to meet and document the standard
<p>1. The learning intervention addresses a knowledge and skills gap that is causing, or will cause, a performance problem. This gap can be the result of changes in new medical practices or job responsibilities, as well as a situation where present performance is not meeting expectations.</p> <p>Supporting interventions needed to ensure that new skills and knowledge will be applied in the workplace are part of the plan.</p>	<p>Documentation (based on existing information about services or a performance needs assessment) that:</p> <ul style="list-style-type: none"> • Identifies an existing job performance gap or problem and its root causes • Verifies a lack of skills and knowledge is one of the root causes and determines a learning intervention is the best solution to this lack of skills and knowledge. • Describes a change in job expectations • Documents all interventions selected to address the job performance gap. 	<p>7 Planning Questions for Training (7PQ): Question 1: What is the problem?</p> <p>Performance Improvement Stages, Steps, and Tools (PI): Stage 3: Define Desired Performance; Stage 4: Describe Actual Performance; Stage 5: Describe Performance Gaps; Stage 6: Find Root Causes; Results of a Performance Needs Assessment or situation analysis</p> <p>Learning for Performance (LFP): Step 1: Specify the learning goal related to the gap in skills and knowledge; Tool 1: Sources of Information Worksheet; Tool 2: Human Resources for Health Context Worksheet; Tool 3: Performance Factors Worksheet</p> <p>Programming for Training (PFT): Chapter 5, Training Needs Assessment</p>
<p>2. A learning goal focuses the learning intervention on new knowledge/skills/attitudes that are needed, or a knowledge/skills/attitude gap that causes a job performance problem. The goal states what the learner will be able to do after the learning intervention.</p>	<p>Written learning goal statement</p>	<p>LFP: Step 1: Specify the learning goal related to the gap in skills and knowledge; Tool 1: Sources of Information Worksheet; Tool 2: Human Resources for Health Context Worksheet; Tool 3: Performance Factors Worksheet; Tool 10: Instructional Program Overview</p> <p>7PQ: Question 1: What is the problem?</p>
<p>3. The learning intervention is planned based on the best information available about services and performance.</p>	<p>Documentation of information resources used in writing the learning goal. Completed LFP Tools 1 and 2 may serve as documentation.</p>	<p>LFP: Tool 1: Sources of Information Worksheet; Tool 2: Human Resources for Health Context Worksheet.</p> <p>Nationally accepted standards. Recent guidance documents.</p>

Standard	As evidenced by	Reference on how to meet and document the standard
4. Stakeholders are identified and involved in determining the performance gap and the learning goal and support the intervention.	Documentation of meeting or interviews with stakeholders	<p>LFP: Tool 1: Sources of Information Worksheet</p> <p>Transfer of Learning (TOL): Introduction (pages 6-9)</p> <p>PI: Stage 2: Obtain and Maintain Stakeholder Agreement</p>
5. Available resources that are adequate and appropriate to meet the learning goal and address the performance gap are identified.	Documentation of information gathered regarding resources available. Completed <i>LFP</i> Tool 6 may serve as documentation.	<p>LFP: Step 3: Identify existing resources and requirements for training; Tool 6: Resources and Requirements Worksheet</p> <p>7PQ: Question 3: What are the resources and constraints for the training?</p>
6. A written budget includes all costs for planning, developing, implementing, and evaluating a training and learning program and is adjusted as needed throughout the project; this would include accommodations needed for trainers and/or learners with disabilities.	A written, approved budget with all necessary items included	Training Works! (TW): Managing Training (pages 9-16)
7. Learner selection criteria are specified based on who performs (or will perform) the job tasks related to the new performance or the performance gap. Information about the targeted learners' characteristics , including any disabilities, and the learners' work situation are used to develop the learning intervention.	<p>A list of learner selection criteria including required entry level skills, background and experience, professional level (nursing student intern, community health worker) and the learners' expected post-training functions</p> <p>Documentation on information gathered about learners. Completed <i>LFP</i> Tools 4 and 5 may serve as documentation.</p>	<p>LFP: Step 2: Learn about the learners and their work setting; Tool 4: Learner Characteristics Worksheet; Tool 5: Work Setting Characteristics Worksheet</p> <p>7PQ: Question 2: Who are the learners and where do they work?</p>
8. Information about job responsibilities (core competencies), standards for performance and essential skills and knowledge for the targeted group of learners is used to develop the learning intervention.	A complete list of essential skills and knowledge required for the job. Completed <i>LFP</i> Tools 7 and 8 may serve as documentation.	<p>LFP: Step 4: Determine job responsibilities (or competencies) and major job tasks related to the gap in skills and knowledge; Step 5: Specify essential skills and knowledge; Tool 7: Job Responsibilities or Competencies and Tasks Worksheet; Tool 8: Essential Skills and Knowledge Worksheet</p> <p>7PQ: Question 4: What do I want the learners to be able to do?</p> <p>National Service Guidelines</p>

Area 2: Developing Curricula and Materials

Aims: To outline an instructional strategy that addresses the learning need or performance gap identified in the planning step. To design a curriculum that is participatory and activity-based to ensure that learners and trainers are actively engaged in the learning process and learners develop the essential skills and knowledge needed.

Standard	As evidenced by	Reference on how to meet and document the standard
<p>9. Learning objectives are based on the essential competencies or major job tasks and the skills, knowledge, and attitudes for each. Written objectives include: an observable performance, measurable criteria or standards, and the conditions under which the learner will perform the objective (e.g., at the work setting or in a role play setting).</p>	<p>Written objectives. Completed <i>LFP</i> Tool 8 may serve as documentation.</p> <p>Curriculum with learning objectives</p>	<p>LFP: Step 5: Specify essential skills and knowledge; Tool 8: Essential Skills and Knowledge Worksheet; Step 6: Write learning objectives; Tool 9: Instructional Planning Worksheet</p> <p>7PQ: Question 4: What do I want the learners to be able to do?</p> <p>PFT: Chapter 10, Designing Training Events</p>
<p>10. A written instructional strategy includes:</p> <ul style="list-style-type: none"> • Program description • Goals and learning objectives • Intended learners (selection criteria) • Training and learning methods • Learning materials • Evaluation methods and assessment tools • Course duration • Suggested course composition (number of learners, trainers/facilitators, etc.) • Training implementation, follow-up and evaluation plans. 	<p>Completed <i>LFP</i> Tool 9 and 10 may serve as documentation.</p> <p>Curriculum includes elements listed as components of the strategy.</p> <p>Written training implementation, follow-up and evaluation plans (see Areas 5 and 6)</p>	<p>LFP: Step 7: Decide how to assess the learning objectives; Step 8: Select the learning activities, materials and approaches and create the instructional strategy</p> <p>LFP: Tool 9: Instructional Planning Worksheet; Tool 10: Instructional Program Overview; Box 17: Components of an instructional strategy; Step 12: Assess effectiveness of the learning intervention and revise; Tool 14: Monitoring and Evaluation Plan</p> <p>7PQ: Question 5: How will I know how effective the training was? Question 6: What learning activities and materials will I use? Question 7: What learning approach will I use?</p> <p>PFT: Chapter 10, Designing Training Events</p>

Standard	As evidenced by	Reference on how to meet and document the standard
<p>11. Written curriculum and supporting materials match the gap in performance or learning need, the learners' characteristics, training-related constraints and resources, the instructional strategy, and local/national requirements (e.g., requirements for credit toward maintaining professional credentials).</p>	<p>Written curriculum Lesson plans Supporting materials related to learning intervention (manuals, models, slides, case studies, CDs, handouts, assessment instruments, training packages, etc.)</p>	<p>LFP: Step 9: Develop, pre-test and revise lessons, learning activities, materials; Tools 10: Instructional Program Overview; Tools 11 and 12: Lesson Plan formats TW: Designing Training (pages 17-24)</p>
<p>12. Stakeholders are involved in the curriculum development process to ensure that strategies and systems are in place to support learner before, during, and after training.</p>	<p>Documentation of interviews, conversations, meetings, feedback, etc. Action plans, work plans, memos of understanding, agreements, etc.</p>	<p>TOL: Transfer of Learning Matrix (page 9) PI: Stage 2: Obtain and Maintain Stakeholder Agreement</p>
<p>13. Contributors to the curriculum are duly acknowledged; all sources used to develop the curriculum are appropriately cited; and authorship, disclaimers, and logos comply with client organization and/or donor agency requirements.</p>	<p>Written acknowledgements (including authorship, if relevant), list of references and citations, as appropriate Compliant use of disclaimers and logos</p>	<p>Client organization and donor agency policies on authorship, acknowledgements and citations Client organization and donor agency policies on marketing and branding</p>

Area 3: Preparing for Implementation of Training and Learning Interventions

Aims: To ensure successful logistical and technical implementation of training and learning interventions. To prepare experiential learning activities to maximize the opportunity for learners to develop skills through real practice. To prepare learners, trainers, and supervisors for their roles before, during, and after the learning intervention to ensure successful transfer of learning.

Standard	As evidenced by	Reference on how to meet and document the standard
<p>14. Logistical arrangements for the learning intervention are made in advance, accommodating trainers and/or learners with disabilities as needed. This may include lodging, training and practicum sites, meals and breaks, per diem, transportation, technological support, etc.</p>	<p>Documentation of communication with staff of lodging site, training site, and practicum sites (if needed)</p> <p>Visit to training site and practicum sites</p>	<p>TW: Managing Training (pages 9-16)</p> <p>LFP: Step 10: Prepare for implementation</p> <p>PFT: Chapter 6, Planning for Training</p>
<p>15. The learning resources needed to carry out the learning intervention (printed materials, models, audio-visual equipment, training packages, etc.) are obtained or produced and ready for use.</p>	<p>Document or communication or visit (as above)</p>	<p>LFP: Step 10: Prepare for implementation</p> <p>TW: Managing Training (pages 13-14)</p> <p>PFT: Chapter 6, Planning for Training</p>
<p>16. Trainer and facilitators are selected according to appropriate criteria and prepared.</p>	<p>Selection is documented and based on expertise required to implement the curriculum, including technical content and skills, training skills and experience.</p> <p>A plan or curriculum for orientation or training of trainers is planned and implemented, including a review of the lesson plans and materials, trainers' roles and responsibilities, support provided, and if needed, practice and feedback in training methods needed to implement the training program.</p>	<p>LFP: Step 10: Prepare for implementation</p> <p>TW: Managing Training (pages 13-14)</p> <p>PFT: Chapter 6, Planning for Training</p>

Standard	As evidenced by	Reference on how to meet and document the standard
<p>17. Mechanisms to support transfer of learning and job performance during the learning intervention are arranged.</p>	<p>Documentation of communication with supervisors and learners prior to implementation</p> <p>Written curriculum indicating plan to support transfer of learning</p>	<p>TW: Managing Training (pages 14-16)</p> <p>TOL: Supervisors—Before Learning (pages 12-13); Trainers—Before Learning (pages 18-19); Learners—Before Learning (page 24-25); Transfer of Learning Matrix (page 9)</p> <p>LFP: Step 10: Prepare for implementation</p> <p>PFT: Chapter 8, Linking Training to Performance on the Job</p>
<p>18. For clinical trainings, adequate caseload, site preparation, preceptors, and trainers are scheduled and arranged.</p>	<p>Documentation of communication with clinic staff at training and practicum sites occurring prior to implementation</p>	<p>LFP: Step 10: Prepare for implementation</p> <p>PFT: Chapter 6, Planning for Training</p>

Area 4: Implementing Training and Learning Interventions

Aims: To ensure that a learning intervention is carried out as planned and runs smoothly. To ensure that skills and knowledge are being transferred according to the curriculum. To ensure that trainers and learners are actively engaged in the learning process. To ensure that feedback and coaching for job performance are occurring throughout the intervention.

Standard	As evidenced by	Reference on how to meet and document the standard
19. Learning resources , materials, equipment, and supplies are available and used for intended purposes during learning intervention.	Documentation of resources used during learning intervention or site visit report	LFP: Step 11: Implement and monitor learning and logistics TW: Managing Training (pages 9-16)
20. Logistical arrangements meet trainers' and learners' needs (rooms, meals, per diem, and any other logistical needs previously determined).	Documentation of logistical issues included in any reports about the learning intervention, or report of visit to learning intervention site	LFP: Step 11: Implement and monitor learning and logistics TW: Managing Training (pages 9-16)
21. Technology required to implement learning intervention is available.	Report of visit to site where learning intervention takes place	LFP: Step 11: Implement and monitor learning and logistics
22. Learning intervention requires active engagement on the part of learners and trainers in meeting the learning objectives.	Written curriculum indicating participatory, activity-based methodology Trainers observed using the curriculum as written and actively engaging learners	TOL: Trainers—During Learning (pages 20-21); Learners—During Learning (pages 26-27) TW: Delivering Training (pages 25-32) LFP: Step 11: Implement and monitor learning and logistics PFT: Chapter 7, Implementing Training and Chapter 12, Commonly Used Training Methods
23. Both knowledge and skills are assessed as planned in the instructional strategy.	Appropriate assessment instruments are used during learning intervention (e.g., observation guides, tests, checklists, etc.). Results of the assessments are reviewed and curriculum adaptations made as needed.	LFP: Step 11: Implement and monitor learning and logistics; Tool 9: Instructional Planning Worksheet; Tools 11&12: Lesson Plan formats PFT: Chapter 9, Evaluation of Training

Standard	As evidenced by	Reference on how to meet and document the standard
<p>24. Skills acquisition is competency-based, and learning practice is closely aligned with actual practice conditions.</p>	<p>Demonstration, practice models, role plays, case studies and problem-based approaches are used where appropriate.</p> <p>Clinical practice is required for clinical skills.</p>	<p>TW: Delivering Training (pages 25-32)</p> <p>LFP: Step 11: Implement and monitor learning and logistics</p> <p>PFT: Chapter 7, Implementing Training</p>
<p>25. All individuals involved in training (trainers and learners) receive feedback.</p>	<p>Observation or reports that trainer provides positive and corrective feedback, coaching, or mentoring</p> <p>Self-instructional training materials include correct responses, so learners can check their work.</p> <p>Distance learning may provide feedback electronically, from peers, site visits, etc.</p> <p>Learners provide feedback to trainer and sponsoring organization throughout learning intervention.</p> <p>Certificates or other notification of success are given upon completion of courses.</p>	<p>TW: Delivering Training (pages 25-32)</p> <p>LFP: Step 11: Implement and monitor learning and logistics</p> <p>PFT: Chapter 9, Evaluation of Training</p>

Area 5: Following up Learners

Aim: To ensure that learners have the tools, opportunities, and support to apply new skills and knowledge on the job.

Standard	As evidenced by	Reference on how to meet and document the standard
<p>26. A written follow-up plan is included as part of the instructional strategy and describes the purpose of the follow-up, the methods to be used for follow-up, and the roles and responsibilities for carrying out learner follow-up.</p>	<p>Documentation of follow-up plan is included in the instructional strategy.</p> <p>Follow-up plan is included in materials given to the learners.</p> <p>Documentation of learner action plans by the end of training</p>	<p>LFP: Step 11: Implement and monitor learning and logistics; Tool 13: Sample Action Plan for Transfer of Learning</p> <p>TOL: Supervisors—After Learning (pages 16, 17); Trainers—After Learning (pages 22, 23); Learners—During Learning (pages 26-27)</p> <p>PFT: Chapter 8, Linking Training to Performance on the Job</p>
<p>27. Mechanisms for follow-up are integrated in the supervision system.</p>	<p>Documentation of trainer, supervisor and/or co-worker communication and support for learner action plan. Existence of systematic communication among supervisors, colleagues, and learners</p> <p>Existing supervision tools or peer- or self-assessment tools that match with the new knowledge and skills</p>	<p>TOL: Supervisors—After Learning (pages 16, 17)</p> <p>TW: Managing Training (pages 15-16)</p> <p>PFT: Chapter 8, Linking Training to Performance on the Job</p>
<p>28. Learners develop action plans with steps to apply learning on the job.</p>	<p>Records of actions taken to address challenges and obstacles (e.g., coaching); records of attention to other challenges such as adequate physical environment, motivation and incentives, clear job expectations and performance feedback</p> <p>Observation and feedback conducted and documented</p> <p>Documentation reviewed with supervisor</p>	<p>LFP: Step 11: Implement and monitor learning and logistics; Performance Improvement (pages 4, 5, 67); Tool 13: Sample Action Plan for the Transfer of Learning; Tool 3: Performance Factors Worksheet</p> <p>TOL: Introduction/Action Plan (pages 10, 11, 33)</p> <p>TW: Managing Training (pages 15-16)</p> <p>PFT: Chapter 8, Linking Training to Performance on the Job</p>
<p>29. Up-to-date information and resources to support job performance are given to all learners.</p>	<p>Materials (e.g., service policies, standards, procedures guidelines, job aids, or training materials) are available and accessible at the learner’s work site.</p>	<p>TOL: Trainers—During Learning (pages 20, 21) Learners—After Learning (pages 28-29)</p>

Area 6: Evaluating Training and Learning Programs

Aims: To assess learner performance on the job. To assess the learning intervention's impact on service delivery. To document successes, lessons learned, promising or best practices, and second generation training. To use evaluation information to make decisions regarding revisions to the curriculum and adjustments to the learning intervention.

Standard	As evidenced by	Reference on how to meet and document the standard
30. A written evaluation plan is included as part of the instructional strategy and describes what will be evaluated, how and where, when, who, and resources needed.	Documentation of plan is included in instructional strategy. Resources required to conduct an evaluation that reflects the scale and budget of the learning intervention are included in the project budget.	LFP: Step 12: Assess effectiveness of the learning intervention and revise; Step 8: Select the learning activities, materials and approaches, and create the instructional strategy; Tool 14: Monitoring and Evaluation Plan PFT: Chapter 6, Planning for Training and Chapter 9, Evaluation of Training
31. Evaluation shows how the learning intervention has affected service providers' (learners') performance on the job.	Documentation of changes in service provider (learner) performance on the job. In some situations this will include comparison to existing data such as a baseline assessment or service statistics.	TW: Evaluating training (pages 33-39) PFT: Chapter 9, Evaluation of Training
32. Evaluation reports reflect program results and are used for decision-making (e.g., revision of work plans or curriculum).	Documented results of training program which may include: outcomes, lessons learned, promising or best practices, and second-generation training	LFP: Step 12: Assess effectiveness and revise TW: Evaluating training (pages 38-39) PFT: Chapter 9, Evaluation of Training

Area 7: Documenting Training and Learning Interventions

Aim: To share knowledge and manage training and learning information. To report on results and successes to outside audiences including donors, collaborating partners, and potential partners. To maintain an inventory of pertinent information about training activities for future use.

Standard	As evidenced by	Reference on how to meet and document the standard
33. A system is used to document and manage information about learners, trainers, learning resources, logistical resources, and training activities.	Paper-based or electronic records are maintained. Local systems may be adequate and in some situation a national HRIS (human resource information system) may be used.	IntraHealth iHRIS software suite: http://www.capacityproject.org/hris/

Area 8: Developing and Implementing National Training Policies and Strategies

Aims: To provide guidance in training and education to support the service delivery goals of national health policy. To identify major areas for capacity building based on national service delivery needs. To link pre-service education and in-service training. To link public and private sector service delivery, professional associations, and regulatory bodies. To coordinate and standardize training to reduce duplication. To standardize learning interventions and coordinate learning interventions with other performance factors. To specify roles and responsibilities of stakeholders involved in training.

Standard	As evidenced by	Reference
34. Agreement by stakeholders on a national training strategy and action plan that addresses key performance gaps identified in a national-level performance needs assessment	Documentation (e.g., national performance needs assessment, documentation of stakeholder meetings)	PI: Stage 4: Describe Actual Performance; Stage 5: Describe Performance Gaps; Stage 6: Find Root Causes; results of a performance needs assessment or situation analysis
35. The national training strategy should, at a minimum include: <ul style="list-style-type: none"> • Overview of training system • Goals and objectives of training strategy • Strategies for the following components: <ul style="list-style-type: none"> ○ Coordination and planning (training information system, action plans, monitoring and evaluation, following up training, etc.) among all partner agencies/organizations involved in training at each level (national, regional, district) ○ Training policies, guidelines, approaches, and curricula ○ Institutional competency in training ○ Linkages between pre-service and in-service training ○ Training management information systems (may be part of HRIS) ○ Monitoring, supervision, and evaluation of training strategy. 	National training strategy and action plan	Bangladesh, Kenya, Mali, Nepal, Uganda, and other countries' national health training policies and/or strategies
36. Linkages exist among all sectors and stakeholders, including professional associations and regulatory bodies, for increased collaboration resulting in standardized approaches to training and education at the national level.	National training strategy and action plan, etc.	Bangladesh, Kenya, Mali, Nepal, Uganda, and other countries' national health training policies and/or strategies
37. An action plan to guide implementation of the strategy. The plan should include: strategy to be implemented, expected results, activities, person(s) responsible, and timeline. Resources to implement the plan are identified.	National training strategy and action plan, etc.	Bangladesh, Kenya, Mali, Nepal, Uganda, and other countries' national health training policies, strategies and/or plans

GLOSSARY

Action plan—a written document that describes the steps that will be taken to achieve specified objectives. Action plans often include objective(s), tasks, person(s) responsible for each task, timeline, and resources needed. In training and learning, action plans are used to specify how new skills and knowledge will be reinforced, strengthened and applied on the job to improve performance (see transfer of learning).

Best practice—a strategy, program, process, activity, or method that shows evidence of working effectively and producing a particular outcome in various settings.

Budget—an itemized summary of estimated or intended expenditures for a given period along with proposals for financing them. The budget for a training program may include costs for staff time, consultants, facilities, travel/transportation, learners' expenses, communication, learning materials, equipment, and supplies.

Competency—a specific set of knowledge, skills, behaviors and attitudes required to perform a job. Also a defined measure of skill or aptitude against which individuals and organizations can be assessed.

Curriculum—a program of learning that specifies the learning goals, content and assessment strategy for evaluating learner performance. It consists of a document that describes desired knowledge, skills, and performance of the learner and the process and content that will be used to achieve the learning objectives. Detailed curricula may also specify training activities and methods, materials, facilities, and resources required for a specific lesson.

Human resource information system (HRIS)—an integrated system for managing information used in human resource (HR) decision-making. A complete HRIS links all HR data from the time professionals enter pre-service training to when they leave the workforce. Typically, the system is computerized and consists of a database for storing the information, software for entering and updating data and reporting and analysis tools.

Instructional strategy—a description of how a learning intervention will be designed, implemented, and evaluated. The instructional strategy may include:

- 1. Instructional program overview** includes a program description, learning goal(s) and objectives, learner selection criteria, types of learning and assessment methods, activities and materials, duration/course schedule, course composition (number of learners, trainers/facilitators, etc.).

Depending on the scale of the learning intervention, may also include:

2. Selection criteria and orientation plan for persons needed to implement the training (e.g., coordinators/managers, trainers, instructors, preceptors, facilitators, and evaluators).

3. The training and learning materials and resources needed (e.g., for learners, coordinators/managers, supervisors, trainers, instructors, preceptors, facilitators, and evaluators).

4. An assessment and evaluation plan that describes monitoring and evaluation activities for the learning intervention, including a list of indicators and a description of the types of data collection instruments.

5. A training management and implementation plan that includes an overall work plan and timeline for the intervention development, implementation and follow-up, and a description of the roles and responsibilities and the resources required.

Learning approaches—the structure or format for the learning intervention.

Approaches usually fall into one of the five following categories: classroom-based learning (with or without a skills/clinical practicum), distance learning, on-the-job learning, independent or self-study, or blended learning (a combination of the aforementioned approaches).

Learning assessment method—techniques and instruments for measuring learners' achievement of the learning objectives. Some methods include written tests, observation (practice), observation (simulation), client records, supervisor interview or questionnaire, etc.

Learning goal—a statement that clarifies, in broad terms, what the learner will be able to do after the learning intervention.

Learning intervention—any type of education or training program. This includes *any educational course or program* (e.g., pre-service or basic education, in-service training, continuing education, continuing professional programs or courses), as well as *all learning approaches* (e.g., classroom-based courses, distance learning, on-the-job learning, independent study, clinical practicum and blended learning approaches).

Performance factors—elements, often interrelated or complementary in their impact, that support good performance in the workplace:

1. Clear job expectations
2. Clear and immediate performance feedback

3. Adequate physical environment, including proper tools, supplies, and workspace
4. Motivation and incentives to perform as expected
5. Skills and knowledge required for the job

Performance gap—the difference between the desired and actual level of health worker performance *for a particular performance in question*, in terms of quality, quantity, and/or timeliness of performance.

Promising practice—a strategy, program, process, activity, or method that has worked effectively in one setting and shows potential for scaling up, transferability, or replication in other settings.

Second-generation training—training conducted by a first-generation trainee independent of technical or financial input from the organization who conducted the first-generation training or training conducted by a trainee independent of technical or financial input from the organization who trained the trainee.

Standards—a set of generally accepted levels of performance.

Stakeholders—groups or individuals who share an interest in or are affected by project outcomes. This may include potential learners, supervisors, co-workers, health clinic staff, collaborating governmental or non-governmental agencies, regulatory bodies or associations, community groups, etc.

Training management information system (TMIS) —an integrated system for managing information used in decision making about training. A complete TMIS tracks all courses, participants, achievement scores and similar data. Typically, the system is computerized and consists of a database for storing the information, software for entering and updating data and reporting and analysis tools.

Training package—a set of materials or tools for training and assessment. In some situations specifically developed to lead to nationally recognized qualifications. A training package outlines the knowledge and skills required, as well as the standard of performance required for an employee to be considered 'competent'. The package may also set national qualifications and guidelines for assessment.

Transfer of learning—a process involving an interrelated series of tasks performed by supervisors, trainers, learners, co-workers, and sometimes others (e.g., government regulators, clients, etc.) before, during and after a learning intervention in order to maximize the transfer of skills and knowledge and improve job performance.

7 Planning Questions for Training

The 7 Planning Questions are a program manager’s planning aid for training. They make planning easier, make more efficient use of planning time and produce essential information needed to develop a training intervention. These 7 Planning Questions correspond to the first few steps of IntraHealth’s *Learning for Performance: a guide and toolkit*, which contains more detailed instructions and worksheets for the entire process of planning, developing, implementing, and evaluating training interventions.

1. What is the problem?

- Identify the **program problem or health worker performance gap**. This could be identified or defined by the performance needs assessment comparing the actual performance and the desired performance described by the national service guides and guidelines.
- Write a **statement describing the gap/problem** that needs to be solved.
- **Verify that training can assist in resolving the gap.**
- If training is part of the solution, then write an overall **goal for the training**—a broad statement of what the learners will be able to do after the training.
- Identify **other interventions** that may be needed to ensure that new skills/knowledge can be applied in the work setting, such as:
 - Clear job expectations
 - Clear and immediate performance feedback
 - Adequate physical environment, including proper tools, supplies, and workspace
 - Motivation and incentives to perform as expected.

2. Who are the learners and where do they work?

- Gather information about the **learner group**, including:
 - Job category and job description
 - Educational background and work experience
 - Reading and writing level and language
 - Current levels of skills and knowledge related to the job performance problems
 - Familiarity with learning approaches, methods, and media
 - Number of learners in each job category.
- Gather information about the **learners’ work settings**, including:
 - Where the learners work (type of facility or community location, services offered, staffing, equipment/supplies, referral system)
 - What resources, references, standards are available on the job
 - Supervision system and motivation system
 - Feedback system (e.g., from peer group, supervisors, or community/clients)
 - Possibility of on-site training.

3. What are the resources and constraints for the training?

Find out about the **resources and practical limits** for the training to help you plan the logistics. Information includes such things as:

- Existing requirements for testing and certification
- Timeframe
- Nationally approved standards or training material that must be used
- Available training facilities and equipment
- Available resource people and trainers/instructors/preceptors and their experience/background
- Available budget, and so forth.

4. What do I want the learners to be able to do?

- List the **job responsibilities and major job tasks** that learners must perform or improve as a result of the training.
- Break down the major job tasks into their **essential skills and knowledge**.
- Then write behavioral (observable, performance-based) **learning objectives** based on this information.

5. How will I know how effective the training was?

- For each learning objective, identify an **assessment method** to measure the behavior specified. Make sure the assessment methods are practical for the available resources and scope of the learning intervention.
- Plan activities to ensure the transfer of learning to quality performance on the job, including training follow-up.

6. What learning activities and materials will I use?

Select learning activities and materials that:

- Build on the learners' previous experience with learning activities and materials
- Are consistent with the available time, facilities, and other resources
- Provide practice with feedback in the behaviors specified in the learning objectives.

7. What learning approach will I use?

Learning interventions generally fall into one of five overall learning approaches:

- Classroom-based learning (with or without a skills/clinical practicum)
- Distance learning
- On-the-job learning
- Independent study or self-study
- Blended learning (combining several of the above approaches).

Select a learning approach that:

- Is consistent with the available resources and requirements
- Allows for the selected learning activities and achievement of the learning objectives.

RESOURCES AND LINKS

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