Training and Education Implementation Plan

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2009



Training and Education Implementation Plan Template

# Introduction to the Template

The Training and Education Implementation Plan outlines the details to the educational intervention outlined in the Business Requirements and Instructional Requirements Documents. The consultant, designer, analyst, trainer, or subject-matter expert must design the implementation for the education and training intervention to ensure that, at its end, the goal of the educational program will be met and that participants return to their duties with enhanced knowledge, skills, and/or abilities (KSAs), as necessary. This document will be used by the Implementation teams as output to their activities.

## How to Use this Template

There are five major parts to this template, listed below, plus an Appendix with tools and templates for your use.

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Filling out the template need not be a labor-intensive process. Although there are five major sections, with sub-sections, each one may only require a few sentences to complete. If a section was provided by the another Requirements document, you can merely refer back to it rather than reproduce it here.

Instructions on how to use the template appear in italicized text, with examples in normal text. Simply delete the instructions and replace the examples with your own text. Don’t forget to:

* Modify the page header text to reflect the name of your project.
* Delete the paragraphs of instructions on this and the previous page, as well as any italicized instructions
* Delete the Appendix, as required; you may wish to create your own appendix.
* Update the Table of Contents (just right click on it)

# Rationale

[This section provides the rationale for the need for a training intervention.]

In July 2011, this office will implement ABCDEFG, a new project management software application for all employees involved in managing projects. The ABCDEFG application is unfamiliar to all but the ABCDEFG project implementation team, and will require that the entire project management workforce be trained to use it. This document outlines the instructional requirements to bring staff up-to-speed with the new software and reduce productivity losses.

# Audience

[In this section, answer the questions What performance gap was identified? and What population requires this educational intervention?]

In July 2011, this office will implement ABCDEFG, the new project management software application for all employees involved in managing projects. The ABCDEFG application is unfamiliar to all but the ABCDEFG project team, and will require that the entire project management workforce be trained to use it, a total of 75 project managers and other staff.

The Design team must create educational plans for this audience to develop solutions, including training, job aids, and a web-based reference library, to ensure a smooth transition from the previous project management application to the new one.

# Project and Implementation Timetables

[Here provide a high-level schedule for the project. Detailed schedules are required for this phase, for the sake of the project team. Example timetables appear below.]

## Project Overall Timeline

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Phase** | **Q1 2010** | **Q2 2010** | **Q3 2010** | **Q4 2010** | **Q1 2011** | **Q2 2011** |
| **Analysis** |  |  |  |  |  |  |
| **Design** |  |  |  |  |  |  |
| **Development** |  |  |  |  |  |  |
| **Implementation** |  |  |  |  |  |  |
| **Evaluation** |  |  |  |  |  |  |

## Implementation Detailed Timeline: Training Implementation and Management

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Phase Tasks, Milestones and/or Deliverables | | Start Date | | End Date | Responsible Role | |
| Implement Readiness Activities (as necessary) | 08/23/10 | | 08/28/10 | | | Project Manager |
| Prepare for Roll-Out | 09/01/10 | | 09/30/10 | | | Project Manager |
| Secure Training Facilities | 10/01/10 | | 10/31/10 | | | Project Manager |
| Purchase or Print Session Materials | 10/01/10 | | 10/31/10 | | | Project Manager |
| Contract Trainers | 10/01/10 | | 10/31/10 | | | Project Manager |
| Prepare Trainers (“Train-the-Trainer” Sessions) | 11/01/10 | | 11/15/10 | | | Project Manager |
| Create Training Schedule | 11/01/10 | | 11/15/10 | | | Project Manager |
| Create and Distribute Marketing Materials | 11/01/10 | | 11/15/10 | | | Project Manager |
| Register Participants | 11/15/10 | | 12/31/10 | | | Project Manager |
| Create Rosters, Tent Cards, etc. | 12/15/10 | | 12/31/10 | | | Project Manager |
| Hold Training Sessions | 01/02/11 | | 01/31/11 | | | Trainer(s) |
| Evaluate Training (Levels 1-3) at intervals | 02/01/11 | | 03/31/11 | | | Project Manager, Instructional Designer, Trainer(s), Direct Supervisors |

# Estimated Resources for Implementation Phase

[In this section list the resources and time estimate (percentage or effort in hours) to be devoted to Design. NOTE: Roles listed and estimates may vary, depending upon the project. The following table is an example only.]

|  |  |  |  |
| --- | --- | --- | --- |
| **Resources Required** | | | |
| **Human Resources** | | | |
| **Role** | **Duration** | **Effort** | **Estimated Total** |
| Project manager/ Instructional designer | 9 months | 20 hours per week | 720 |
| Administrative | 9 months | 8 hours per week | 288 |
| Content experts | 3months | 20 hours per week | 240 |
| Graphic designer | 3 months | 40 hours per week | 480 |
| Writer/Editor | 3 months | 16 hours per week | 192 |
| Trainers | 3 months | 16 hours per week | 192 |
| Total Human Resources |  |  | 2112 |
| **Tools and Other Resources** | | | |
| **Resource** | **Number / Amount** | **Unit Cost** | **Estimated Total** |
| System Access Permissions | 16 | 0 | 0 |
| Training Database | 1 | \* | - |
| Total Resources |  |  |  |

\*IT department estimates of costs for additional database already planned in the IT plan.

All resources requested are on staff and available. Technical requirements for the training database will be provided by the IT department.

# Training Management

[Training Management involves the preparation of trainers, marketing and advance awareness of upcoming opportunities for training to the proposed audience, obtaining facilities and materials for the sessions, scheduling and registration, as well as holding training sessions and evaluating them afterwards for effectiveness. Under the following headings, provide brief information about who will teach the class, whether a Train-the-Trainer session will be held, where training will occur, and so forth. To complete this session, simply delete the example text and type in your own plan.]

### Instructor Selection and Preparation Plan

Instructors from previous software projects are available, have obtained release time for preparation and training, but are unfamiliar with the new product. A train-the-trainer workshop will be needed, and a course pilot will be required. Instructors will need one-week of individual study and one week of involvement in the pilot and corrections. The Train-the-Trainer session will take two to three days of release time.

### Training Facilities Plan

Training rooms at Illini Hall (UIUC) and the Administrative Office Building (UIC) are available for the proposed sessions. Tentative reservations have already been made. Two sessions to accommodate varying schedules will be held on the Springfield campus in training rooms there.

### Advance Awareness and Marketing Plan

Advance awareness activities have been planned. The Project Manager will:

* Discuss changes with Deans, Directors, and Department Heads to prepare them for training availability, work process changes, and impacts
* Attend unit staff meetings to discuss with staff changes that are proposed, with a brief demonstration as the date of go-live approaches
* Announce coming changes on internal websites
* Email at monthly and then bi-weekly intervals until training is available, for both advance awareness and training registration updates
* Write and publish a brief for Inside Illinois newspaper

A more formal communications plan will be completed as Development completes, and is beyond the scope of this plan.

### Session Scheduling Plan

Sessions will be scheduled for Mondays through Thursdays for four weeks in January, 2011. This plan should allow for make-up session due to illness and other individual absences or scheduling issues. Urbana and Chicago campuses will be scheduled in alternate weeks and Springfield sessions will be held on Fridays.

### Participant Registration Plan

Participants will register through the established training registration system. There will be no continuing education credits that might require communications with certifying bodies.

### Hold Training Sessions Plan

Sessions will run from 8:30 a.m. through 4:30 p.m., with two mid-session breaks and a one-hour lunch break. Parking is available in nearby lots and on the street.

See Training Checklist in the Appendix for further details.

### Evaluation Plan

Program Evaluation will be performed for three levels as follows.

* Level 1 Session Evaluation; Level 1 Instructor Evaluation; Level 1 Materials Evaluation
  + All level 1 evaluation will be collected immediately following training to ascertain student reaction. See Appendix for Level 1 Evaluation form.
  + Average scores of 4 or more will be considered success.
  + Comments will be evaluated and corrections made as possible during future training sessions.
* Level 2 Learning Evaluation
  + Job aids were developed to provide on-the-job support.
  + Online help was developed to provide on-the-job support
  + Use of these helps will be evaluated as referential to learning.
  + Support calls will be evaluated to determine areas of difficulty and areas of success in learning.
  + A diminution of support calls will be considered success in learning
* Level 3 Transfer Evaluation
  + Unit supervisors will be given a short, one-page form to record observations about learning transfer to the job.
  + Monthly discussions with unit supervisors will determine whether learning has transferred to workplace processes.

# Appendix: Tools for Implementation

The following tools are provided for your use in preparing for training implementation.

* Training Implementation Overview
* Course Datasheet Example
* Course Marketing Example
* Pre-Training Checklists
* Training Roster / Sign-In Sheet
* Level 1 Course Evaluation Template

## Training Implementation Overview

|  |
| --- |
| Trainers and Trainer Preparation: |
| Training Schedule: |
| Marketing Materials and Distribution Channels: |
| Registration and Rosters: |
| Evaluate Course against Objectives: |

## Course Marketing Example\*

|  |  |
| --- | --- |
| **Workshop Title** | Workshop Title |
| **Length** | ? Hours |
| **Who Should Attend** | All employees involved in [name the process or topic] |
| **Prerequisites** | No experience required |
| **Benefits** | Students will …. |
| **Overview** | This workshop presents …. |
| **Objectives** | At the end of this series, participants will:   * Objective 1 * Objective 2 * Etc. |
| **Topics Covered** | Topics include:   * Topic A * Topic B |

\*Note: A datasheet like this can be used to promote the workshop on paper, in PDF format, or in an email. You can easily add letterhead and a brief paragraph to pique reader interest.

## Marketing E-Mail Example\*

The University has been working with ABCDEFG Software Inc. to develop and implement a replacement for the existing PREvious System (PRES).

ABCDEFG Software offers a streamlined contract management lifecycle from beginning to end, managing contract assembly, review, and processing efficiently. Contract documents based on templates allows end-users the flexibility to select necessary contract options. Upside Contracts also provides versioning, improved editing, formatting and printing.  Contract preparers will be able to attach documents of all types to contracts. Depending upon dollar limits, the application provides an electronic workflow approval process as well.  Automatic e-mail notifications and reporting capabilities give all contract reviewers improved oversight.

Implementation of this new system will require all PRES clients to attend training in the new system. You are invited to attend training at your convenience. Check our website for a session that meets your needs at: <http://www.uillinois.edu>

\*Note: An email like this can be used to promote the workshop on paper, in PDF format, or in an email. You can easily incorporate the Datasheet to flesh out details.

## Pre-Training Checklists

|  |  |
| --- | --- |
| Course Title: |  |
| Training Date(s) Needed |  |
| Training Location(s) (cities) |  |
| Instructor(s) |  |

### Training Checklist[[1]](#footnote-2)

|  |  |  |
| --- | --- | --- |
|  | Task | Date Complete |
|  | Identify required course(s) |  |
|  | Identify unit coordinator(s) |  |
|  | Identify instructor(s) |  |
|  | Identify potential date(s) for classes |  |
|  | Identify number of students attending |  |
|  | Identify course technical requirements |  |
|  | Identify potential classroom(s) |  |
|  | Contact classroom technical coordinator(s) and obtain complete specifications for each venue[[2]](#footnote-3). |  |
|  | Select classroom for each training session. |  |
|  | Verify that all equipment and support are available at each location. |  |
|  | Create roster[[3]](#footnote-4) |  |
|  | Register students |  |
|  | Order or print materials for each registered student[[4]](#footnote-5) |  |
|  | Send registration email to each student. |  |
|  | Send reminder email to each student. |  |
|  | Reserve staff car (if necessary) |  |
|  | Obtain lodging for instructor (if necessary) |  |
|  | Order refreshments |  |
|  | Verify that students can logon to database(s) |  |

### Facilities

|  |  |  |  |
| --- | --- | --- | --- |
| Needed? | Item | | Special Requirements |
|  | Reserve appropriate room | |  |
|  | Room capacity = | |  |
|  | Room window coverings? | |  |
|  | Procure Equipment | |  |
|  | Podium | |  |
|  | Microphone(s) for presenter(s) – lavaliere | |  |
|  | Microphone(s) for podium | |  |
|  | Speaker table and chair(s) | |  |
|  | Projector (with remote control, as required) | |  |
|  | Projector screen | |  |
|  | Instructor computer workstation | |  |
|  | Instructor laptop | |  |
|  | Instructor computer workstation software | |  |
|  | Instructor computer workstation logon | |  |
|  | Student computer workstation(s) – Number = | |  |
|  | Student computer workstation software | |  |
|  | Student computer workstation logons | |  |
|  | On-site computer support person name & number  On-site computer support person availability time | |  |
|  | Instructor special-height chair | |  |
|  | White board | |  |
|  | Flip chart | |  |
|  | Flip chart paper | |  |
|  | White board markers | |  |
|  | White board eraser | |  |
|  | Overhead projector | |  |
|  | Refreshments | |  |
| Tech Support Contact(s): | |  | |
| Tech Support Availability: | | From: To: | |

#### Notes on Facilities

### Lodging and Transportation for Instructor(s) and Others

|  |  |
| --- | --- |
| **Transportation** |  |
| Staff Car |  |
| Personal Car |  |
| Train |  |
| Plane |  |
| **Lodging** |  |
| Number |  |
| Requirements |  |
|  |  |
|  |  |
| **Special Needs** |  |

#### Notes on Lodging and Transportation

### Materials

|  |  |
| --- | --- |
| Printed Roster |  |
| Course Materials (Title) |  |
| Vendor |  |
| Price per Unit |  |
| Units Required |  |
| Date Needed |  |
| Tent Cards |  |
| Evaluations |  |
| Shipping |  |
| Database Entries |  |

#### Notes on Materials

### Participants

|  |  |  |
| --- | --- | --- |
| Additional Personnel Attending: |  | |
| Attendee No. (Total): |  | |
| Attendee Dept/Unit(s): |  | |
| Dept/Unit Contact(s): |  | |
| Unit Coordinator Name |  | |
|  | **Date** | **By Whom, To Whom, or For Whom** |
| Preliminary Roster Received? |  |  |
| Confirmed Roster Received? |  |  |
| Invitation Sent? |  |  |
| Reminder Sent? |  |  |
| Special Needs? |  |  |

#### Notes on Participants

## Training Attendance Roster / Sign-In Sheet

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Title | Presenter | Date | Campus | Location |
|  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
| # | Attendee | Signature |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 10 |  |  |
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| 12 |  |  |
| 13 |  |  |
| 14 |  |  |
| 15 |  |  |
| 16 |  |  |
| 17 |  |  |
| 18 |  |  |
| 19 |  |  |
| 20 |  |  |
| 21 |  |  |
| 22 |  |  |

## Level 1 Training Evaluation Form Template

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Please use your experience in this training to rate the following statements.  Your feedback will help us to ensure that we continue to meet your training needs. | | | | | | | |
| Instructor: | | Date: | | | | | |
| Course Title: | | | | | | | | |
|  | | Agree Disagree | | | | | |
| Overall Rating | |  |  |  |  |  | |
| The training was worth attending. | | 5 | 4 | 3 | 2 | 1 | |
| Training Design | |  |  |  |  |  | |
| The objectives were clearly communicated and met to my satisfaction. | | 5 | 4 | 3 | 2 | 1 | |
| The topics were well organized and easy to understand. | | 5 | 4 | 3 | 2 | 1 | |
| The pace of the training was appropriate for the topics covered. | | 5 | 4 | 3 | 2 | 1 | |
| The level of difficulty of the content was appropriate for me. | | 5 | 4 | 3 | 2 | 1 | |
| Instructor | |  |  |  |  |  | |
| The instructor performed well overall. | | 5 | 4 | 3 | 2 | 1 | |
| The instructor is knowledgeable about the subject matter. | | 5 | 4 | 3 | 2 | 1 | |
| The instructor practiced effective time management. | | 5 | 4 | 3 | 2 | 1 | |
| The instructor answered my questions to my satisfaction. | | 5 | 4 | 3 | 2 | 1 | |
| Training Exercises | |  |  |  |  |  | |
| I found the exercises valuable in learning how to apply the concepts. | | 5 | 4 | 3 | 2 | 1 | |
| Training Application | |  |  |  |  |  | |
| I will apply what I learned to my job and/or other areas of my life. | | 5 | 4 | 3 | 2 | 1 | |
| I will recommend this training to others within my organization. | | 5 | 4 | 3 | 2 | 1 | |
| Logistics | |  |  |  |  |  | |
| The seating arrangements were appropriate for the session. | | 5 | 4 | 3 | 2 | 1 | |
| I was able to see and hear the presentation without distractions. | | 5 | 4 | 3 | 2 | 1 | |
| Ample breaks were provided without disrupting the flow of the session. | | 5 | 4 | 3 | 2 | 1 | |
| Adequate beverages and food were provided. | | 5 | 4 | 3 | 2 | 1 | |
| Comments  What topics would you have liked to have spent more or less time on?  What did the instructor do that worked well and what would you suggest to improve his or her effectiveness?  What was most useful about the exercises?  What changes would you recommend to improve the course and make it more effective? | | | | | | | |

If you need additional space for your comments, please use the back of the form.

1. See worksheets, on separate pages. [↑](#footnote-ref-2)
2. See Facilities worksheet, on separate page. [↑](#footnote-ref-3)
3. See Roster, on separate page. [↑](#footnote-ref-4)
4. See Materials checklist, on separate page. [↑](#footnote-ref-5)