Training plan checklist

The purpose of this document is to provide a checklist of things to consider when planning training for the use of a new or updated case management system or similar service delivery system. While we have used our experience to develop the checklist, it should not be considered as being complete and will need to be tailored to your specific environment and staff so that it covers all aspects of the training you require.

Needs and skills analysis

- Organisational needs - this should tie in with the original vision / mission of the project.
  - Why are you doing this project?
  - What did you hope to achieve?
  - What will the staff need to be able to do to achieve this?
- Assess the capabilities of staff against the organisational needs with particular reference to:
  - the skills required
  - the knowledge that needs to be gained

Training scope

- Training objectives
  - What are you hoping to achieve with the training?
  - What specific objectives do you have in each training area?
  - What is not covered in this training
- Assumptions
  - What have you assumed will be in place for this training to occur?
- Constraints
  - What will impact on the success of the training programme / plan? (time between training & people getting to use the system, the amount of time people have available to be trained, baseline IT skills, etc.)

Designing the training

- Know which roles (e.g. administrator, team leaders, case workers, super users) are within the system and whether separate training will be required for each role
- Split the training into manageable parts to ensure retention e.g. creating a client, creating a referral, reporting.
- Make the sessions short but useful
- Make it hands-on
- Provide easy-to-use user guides that are relevant to particular user groups. These may need to be developed from scratch or the vendor may provide a template on which to base the manual.
- Use different methods to support different learning styles

Training programme

- Prerequisites
  - What does the trainee need to know before arriving for the training?
- Types of training
  - for the different types of users (administrators, super-users, case workers, executive etc.)
- Training schedule
  - When?
  - Where? - in a training room, at the user's desk
  - By whom – the vendor, the super-user, system champion
  - For whom – who is to attend?
- Training logistics
  - What is required to deliver the training? Projectors, laptops, manuals, internet connection etc.

Roles and responsibilities

Who is going to do what?

- Vendor vs staff
- Administrators vs system champions

Budget

- Cost of developing and delivering the training
  - travel, accommodation, time (for vendor or staff)
  - venue hire (if necessary)
  - materials (manuals)
  - hire of equipment (projectors, additional PC's etc.)
- Time

Things to consider

- Remember absent staff
- Ongoing training
  - Requirement for ongoing support and for communicating changes in the system.
  - Ensure that super-users or system champions have been provided with time to support staff post implementation (new and system changes) and new staff
- Minor vs major system changes:
  - Minor changes may be communicated via an email and a simple demonstration; major changes may be managed with workshops similar to initial training.
- New Staff