1   Training Plan Template

As described in Section 4.2.1 of the Training Effectiveness Toolkit, a Training Plan will help define the specific activities that will be conducted to carry out the training strategy.

Background

Scope

Organizational Training Needs

Training Methods

This section describes the training methods that will be utilized. Training leads can use the Applicable Methods column in the table to indicate which methods are applicable for the training program or course.

Figure 1 – Training Methods

Applicable Methods	Teaching Method	Features
	Case study	Participants practice problem-solving with relevant examples. Participants demonstrate high-level cognitive skills (e.g., evaluation, analysis), and form arguments and counterarguments.
	Coaching	Participants apply knowledge on the job, unlock participant potential, increase knowledge sharing and reinforce other training methods.
	Discussion	Participants evaluate two or more positions on an issue, practice critical thinking, draw on learner knowledge and expertise, form arguments and defend positions. Some discussions consist of an expert panel, which allows learners to understand discipline nuances and areas of debate, relate knowledge to real world examples and listen to different opinions on a topic.
	Labs	Participants receive and respond to immediate feedback, develop process skills, practice physical or manual skills and evaluate results of own work.
	Lecture	Conveys information to supplement reading or self-study, responds to student misconceptions or difficulties, stimulates interest in a new area.
	Online learning	Allows geographically dispersed participants to learn, often at their own pace, through online technologies or delivery methods (e.g., webinars, podcasts, videos).
	Simulation	Demonstrates in person or via technology the application of participant knowledge to different scenarios (laboratory setting or role plays). A clinical setting (real or simulated) would be required for a subject matter expert (SME) to facilitate the exercise and give feedback.
	Small group activities	Provides hands-on skill building and problem-solving. Participants are divided into small groups and assigned a timed task to complete as a team. The output of these activities will be shared with the larger group and used as input to the next segment of the module.

Applicable Methods	Teaching Method	Features
	Role plays	Provides a simulated experience in the situation being acted out. Gives opportunities for participants to develop solutions to unpredictable situations and conditions.

Course Materials

This section describes the course materials that will be used. Training leads can use the Applicable Materials column to indicate which materials will be used for the training program or course. The comments column can be used to include additional information specific to each training or course.

Figure 2 – Course Materials

Applicable Materials	Administrative Materials	Description	Comments
	Accreditation/ certification materials	• Each credentialing and continuing education body has its own requirements and forms required to request credit for a course	
	Course description/ agenda	• May be two separate documents or one combined document • Describes the course content • Sets expectations for the course • Includes duration, breaks, objectives, prerequisites	
	Course evaluations	• Kirkpatrick Level 1 Reaction – Measures participant's reaction to various aspects of the training including satisfaction with content, instructors, learning environment and appropriateness of material for learner group • Measure the achievement of learning objectives	
	Course registration forms	• Requests participant demographic information • Confirms registrant has taken prerequisites or meets other requirements (e.g., rank, education, certification)	
	Invitation or course announcement/ advertisement	• Announce the course and requests the presence of the recipient • Should include course objectives; target audience (if mandatory, this should be noted); location, date and time of course (may include transportation options and/or a map)	

	Participant records	• Records should be created and maintained in a secure environment
		• Academic records are governed by multiple regulations, laws and accreditation standards
		• Official records may include:
		  – Dates of enrollment
		  – Courses taken, with the units of credit or time allotted to each subject	

Applicable Materials	Administrative Materials	Description	Comments
		– Examination results	
	Pre- and/or post-assessment exams	• Level 2 Learning – Pre- and/or Post-Assessment measures knowledge gained during the training • Measures the achievement of learning objectives	
	Sign In Sheet	• Participants document training attendance	

Applicable Materials	Learner Materials	Description	Comments
	Activities and Exercises	• Provide immediate practice opportunity for new skills • Allow instructor/facilitator to monitor transfer of learning and adjust pace • May include scenarios or real-world examples	
	Handouts	• Include pertinent course summaries to be used for reference during and after the course	
	Job Aids	• Graphics, flow charts, process flows, checklists to be used for quick reference after the course	
	Manuals	• Support course instruction • Provide post-course reference	
	Presentations	• Used to support verbal presentation • Reach visual learners	
	Visual aids	• Flip charts, posters to be used for posting frequently referenced training concepts	
	Workbooks	• Provide post-course reference	

Applicable Materials	Instructor Materials	Description	Comments
	Attendee list	• Allows instructor to prepare for and tailor group exercises to the number of participants	
	Contact list	• List of important points of contact (e.g., training team members, computer and technology support, venue managers, dining and hotel information)	
	Facilitator guides	• Provide clear guidance and procedural notes on the event timing, content, delivery style and delivery methods instructors/facilitators should follow • Support consistent delivery from session to session and between different instructors • Describes equipment and supply needs • Background on a specific technical topic, guidance and questions to raise on role playing exercise	

Applicable Materials	Administrative Materials	Description	Comments

	Instructor notes	• Provides direction to the facilitator regarding:
		   – Ideas, points and examples the instructor may use during content delivery
		   – Frequently asked questions and appropriate answers
		   – How to set up exercises
		   – How to de-brief exercises
		   – References for the content presented	

Training Roles and Responsibilities

This section identifies the specific roles and responsibilities required to deliver the training.

Figure 3 – Training Roles, Responsibilities and Requirements

Role	Responsibility	Requirements
Training Lead		
Instructor		

Course Modules and Descriptions

The following section should be used to provide an overview of course objectives, content, timeframes and instructors.

Figure 4 – High Level Course Design

Module	Time (Min)		Overview of content & method	Instructor
1			• Content: • Method:	
2			• Content: • Method:	
3			• Content: • Method:	

Training Schedule

This section can be used to develop a timeline for developing and delivering training. The schedule also includes necessary coordination and logistics tasks.

Figure 5 – Training Schedule

Timeline	Activity
Time Period	
Time Period	
Time Period	

Evaluation of Training Impact

This section describes the process that will be used determine how training has influenced a participant's job performance and how that impact translates into results for the larger targeted group.

Figure 6 – Evaluation Methods

Kirkpatrick Level		Description	Data Collection Methods
Level 1	**Reaction**	The degree to which participants react favorably to the training.	
Level 2	**Learning**	To what degree participants acquire the intended knowledge, skills, attitudes, confidence and commitment based on their participation in a training event.	
Level 3	**Behavior**	To what degree participants apply what they learned during training when they return to duty.	

Kirkpatrick Level		Description	Data Collection Methods
Level 4	Results	To what degree targeted outcomes occur as a result of the training event and subsequent reinforcement.	

Continuous Improvement Process

Course Change Control Procedures