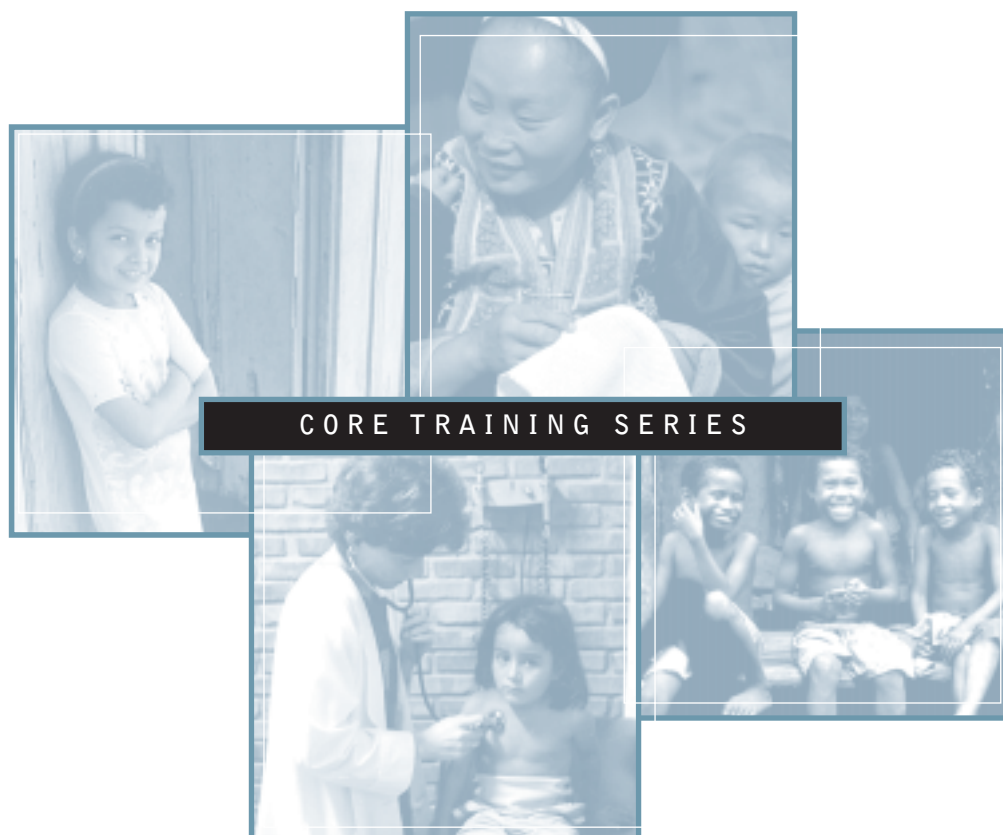


QUALITY

ASSURANCE

PROJECT



CORE TRAINING SERIES

# Training of QA Trainers

## Participant Manual



The Quality Assurance (QA) Project is funded by the U.S. Agency for International Development (USAID), under Contract Number HRN-C-00-96-90013. The QA Project serves countries eligible for USAID assistance, USAID Missions and Bureaus, and other agencies and nongovernmental organizations that cooperate with USAID. The QA Project team consists of prime contractor Center for Human Services; Joint Commission Resources, Inc.; and Johns Hopkins University (including the School of Hygiene and Public Health [JHSPH], the Center for Communication Programs [CCP], and the Johns Hopkins Program for International Education in Reproductive Health [JHPIEGO]). The QA Project provides comprehensive, leading-edge technical expertise in the design, management, and implementation of quality assurance programs in developing countries. Center for Human Services, the nonprofit affiliate of University Research Co., LLC, provides technical assistance and research for the design, management, improvement, and monitoring of health systems and service delivery in over 30 countries.

# TABLE OF CONTENTS

## PARTICIPANT MANUAL

<b>OVERVIEW</b>	.....	1
<b>INTRODUCTION</b>	Course Design.....	4
	Evaluation .....	5
	Course Syllabus .....	6
	Course Outline .....	8
<b>PRECOURSE QUESTIONNAIRE</b>	How the Results Will Be Used .....	10
	Questionnaire 11 .....	
	Assessment Matrix.....	14
<b>CASE STUDIES</b>	Case 1: How and Why People Learn .....	16
	Case 2: Creating a Positive Training Climate.....	16
	Case 3: Creating a Positive Training Climate.....	17
	Case 4: Creating a Positive Training Climate.....	17
<b>JOB AIDS</b>	Using the Job Aids .....	18
	Classroom Presentation Skills.....	19
	Skills used in Leading Exercises.....	21
<b>EVALUATION</b>	Training of QA Trainers Course Evaluation.....	22
<b>OVERHEADS</b>	<b>Chapter 1</b> -An Approach to Quality Assurance Training .....	1-1
	<b>Chapter 2</b> -Creating a Positive Training Climate .....	2-1
	<b>Chapter 3</b> -Using Audiovisual Aids .....	3-1
	<b>Chapter 4</b> -Using Interactive Training Techniques.....	4-1
	<b>Chapter 5</b> -Using Competency-Based Assessments .....	5-1
	<b>Chapter 6</b> -Teams in Training.....	6-1
	<b>Chapter 7</b> -Conducting a QA Training Course .....	7-1

# OVERVIEW

## BEFORE STARTING THIS TRAINING COURSE

This training course is different from traditional classroom training. First of all, it is based on the assumption that people participate in training courses because they:

- Are **interested** in the topic
- Wish to **improve** their knowledge or skills and thus their job performance
- Desire to be **actively involved** in course activities

For these reasons, all of the course materials focus on the participant. For example, the course content and activities are intended to promote learning, and the participant is expected to be actively involved in all aspects of that learning.

Second, in this type of training, the trainer and the participant are provided with a similar set of educational materials. The trainer by virtue of her/his previous training and experiences works with the participants as an expert on the topic and guides the learning activities. In addition, the trainer helps create a comfortable environment and promote those activities that assist the participant in acquiring the new knowledge and skills.

Finally, this training focuses on what the participant will **do** as a result of the training, not what the participant will be capable of doing. Participants will actually perform skills during the training and training may extend to a practicum or observed performance outside the class time. Since this course trains QA trainers, it is appropriate to evaluate participants' skills during the first training conducted by the new trainers, which may be several weeks after this classroom event.

## TRAINING APPROACH

The **mastery learning** approach to training assumes that all participants can master (learn) the required knowledge or skills provided there is sufficient time and appropriate training methods are used. The goal of mastery learning is that 100 percent of those being trained will “master” the knowledge and skills on which the training is based.

This approach to training is discussed in **Chapter 1** of the reference manual. It is important that participants understand this approach, which emphasizes **adult learning principles, behavior modeling** and a **competency-based assessment** of learning. Rather than re-state these topics here, refer to the reference manual for a complete discussion of this training approach.

## COMPONENTS OF THE TRAINING PACKAGE

This course is built around use of the following components:

- Need-to-know information contained in a **reference manual**
- A **participant handbook** containing an overview of the course, a validated questionnaire used to assess knowledge at the start of the course and self-assessment checklists which break down training skills into their essential steps.
- **Teaching aids, exercises and audiovisual materials**
- **Competency-based performance evaluation**

The reference manual recommended for use in this course is *Training of QA Trainers* which contains practical “how to” information and techniques to help the QA trainer conduct participatory QA training courses.

## USING THE TRAINING PACKAGE

In designing the training materials for this course, particular attention has been paid to making them “user friendly” and to permit the course participants and trainer the widest possible latitude in adapting the training to the participants’ (group and individual) learning needs. For example, at the beginning of this course an assessment is made of each participant’s knowledge related to training. The results of this pre-course assessment are then used jointly by the participants and trainer to adapt the course content as needed so that the training focuses on acquisition of **new** information and skills.

A second feature relates to the use of the reference manual and participant handbook. The **reference manual** is designed to provide all of the essential information needed to conduct the course in a logical manner. Because it serves as the “text” for the participants and the “reference source” for the trainer, special content handouts or supplemental materials are not needed. (Participants will receive handouts of items which are returned to the trainer, such as course evaluations). In addition, because the manual **only** contains information that is consistent with the course goals and objectives, it becomes an integral part of all classroom exercises

The **participant handbook**, on the other hand, serves a dual function. First and foremost, it is the road map which guides the participant through each phase of the course. It also contains the course syllabus and course outline and schedule as well as all supplemental printed materials (pre-course questionnaire, individual and group assessment matrix and self-assessment skills checklists) needed during the course.

The **trainer's guide** contains the same material as the participant handbook as well as material for the trainer. This includes the pre-course questionnaire answer key, the mid-course questionnaire and answer key and competency-based qualification checklists.

In keeping with the training philosophy on which this course is based, all training activities will be conducted in an interactive, participatory manner. To accomplish this requires that the role of the trainer continuously change throughout the course. For example, s/he is an **instructor** when presenting a classroom demonstration; a **facilitator/coach** when working with teams or helping participants practice a specific skill; and an **evaluator** when objectively assessing participant performance.

**In summary**, the CBT approach used in this course incorporates a number of key features. **First**, it is based on adult learning principles, which means that it is interactive, relevant and practical. Moreover, it requires that the trainer facilitate the learning experience rather than serve in the more traditional role of an instructor or lecturer. **Second**, it involves use of behavior modeling to facilitate learning a standardized way of performing a skill or activity. **Third**, it is competency-based. This means that evaluation of the participant is based on **how well** s/he performs the procedure or activity not just **how much** has been learned. Results of evaluation guide adaptation of the training to allow each participant to practice new skills until he/she becomes competent. By the time the training is complete, **every** participant should be able to perform **every** skill or activity competently. **This is the ultimate measure of training.**

# INTRODUCTION

## COURSE DESIGN

This training skills course is designed to help health workers (e.g. physicians, nurses, midwives, administrators, information officers, clinical assistants) become more effective QA trainers. The course builds on each participant's past knowledge and takes advantage of her/his high motivation to accomplish the learning tasks in the minimum time. Training emphasizes **doing**, not just knowing and uses **competency-based evaluation** of performance.

This course consists of three components:

- **Provision of training knowledge.** Participants learn about and practice using the mastery approach to training. They will perform competency-based assessments of knowledge and skills and demonstrate application of adult learning and behavior modeling concepts in training delivery.
- **Provision of training skills.** Participants learn about and practice effective presentation skills in both classroom and small group situations.
- **Practice in conducting QA training.** During the course, participants use QA topics in practice teaching. Soon after completing the course, the participant will cotrain one or more QA courses with a senior (level two) trainer, preferably the trainer who taught the training skills course. In subsequent courses, as the new trainer becomes more skilled in training, s/he is assisted by the senior (level two) trainer only as needed.

This training course differs from traditional courses in several ways, as described below.

- Early in the course, participants demonstrate their:
  - knowledge of training skills by completing a written **Pre-course Questionnaire**
  - skill in delivering training by doing short practice teaching
  - In addition, participant skills in small group presentations, use of job aids and use of training skills self assessments will be assessed throughout the course
- Classroom sessions focus on key aspects of QA training, such as working in teams:
  - Progress in knowledge-based learning is measured during the course using a standardized written assessment (**Mid-course Questionnaire**)

- Evaluation of each participant's performance of training skills is conducted by the trainer using a competency-based skills checklist

Successful completion of the course is based on mastery of both the knowledge and skills components.

## EVALUATION

This training skills course is designed to produce competent QA trainers. Qualification as a QA trainer usually is attained through cotraining one or more QA courses while being assisted by a senior (level two) trainer.

Qualification is a statement by the training organization that the participant has met the requirements of the course in knowledge, skills and practice. Qualification does **not** imply certification. Personnel can be certified only by an authorized organization or agency.

Qualification is based on the participant's achievement in three areas:

- **Knowledge**—A score of at least 85% on the **Midcourse Questionnaire**
- **Skills**—Satisfactory performance of training skills
- **Practice**—Demonstrated ability to conduct QA training

Responsibility for the participant becoming qualified is shared by the participant and the trainer.

The evaluation methods used in the course are described briefly below:

- **Midcourse Questionnaire.** This knowledge assessment will be given at the time in the course when all subject areas have been presented. A score of 85% or more correct indicates knowledge-based mastery of the material presented in the reference manual. For those scoring less than 85% on their first attempt, the trainer should review the results with the participant individually and guide her/him on using the reference manual to learn the required information. Participants scoring less than 85% can take the Midcourse Questionnaire again at any time during the remainder of the course.
- **Skills.** Satisfactory performance of training skills assessed during the course. The trainer will use the **Training Skills Checklists** to evaluate each participant as s/he gives presentations during the course.



- **Practice.** Demonstrated ability to conduct QA training. Following the training skills course, each participant will be provided the opportunity to conduct QA training while being assisted (and evaluated) by an advanced trainer until s/he becomes **proficient** and thus qualified as a trainer.

## **COURSE SYLLABUS**

### **Course Description**

This one-week (5-6 day) training course is designed to prepare the participant to conduct QA training based on a participatory, competency based approach to training.

### **Course Goal**

To provide the participant with the knowledge and skills needed to conduct competency-based QA training.

### **Participant Learning Objectives**

By the end of the training course, the participant will be able to:

- Apply a competency-based, participatory approach to QA training
- Plan, establish and maintain a positive training environment
- Prepare and use audiovisual aids
- Present information effectively using interactive training techniques
- Facilitate small group activities
- Evaluate acquisition of new knowledge and skills using competency-based assessment instruments
- Maintain a positive learning environment when using participant teams to accomplish learning objectives
- Conduct and document a QA training course

### **Training/Learning Methods**

- Illustrated lectures and group discussions
- Individual and group exercises, including case studies
- Guided practice of training skills, with feedback from participants and trainers

## **Training Materials**

This course handbook is designed to be used with the following materials:

- Reference manual: *Training of QA Trainers* (QA Project)
- Participant handbook
- Trainer guide and trainer package: including overheads, course evaluations and mid-course questionnaires

## **Participant Selection Criteria**

Participants for this course should be health workers who have been involved in QA activities, preferably as a coach or participant in a QA team. In addition, their supervisors must allow participants to conduct QA training in their own, or other, work sites.

## **Methods of Evaluation**

### ***Participant***

- Pre- and Mid-course Questionnaires
- Self-evaluation checklists for skills used in classroom presentation and leading exercises
- Checklists for skills used in classroom presentation and leading exercises (completed by clinical trainer)

### ***Course***

- Course Evaluation (Participant Reaction form) and Trainer Evaluations to be completed by each participant)

## **Course Duration**

- 5 ½ sequential days of training

## **Suggested Course Composition**

- No more than 20 participants
- 3 or 4 trainers (one for each small group of 5 -6 participants)

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
<ul style="list-style-type: none"> <li>• Welcome</li> <li>• Ground rules</li> <li>• Objectives</li> <li>• Overview</li> <li>• Housekeeping</li> <li>• Introductions</li> <li>• <b>Pre-course assessment</b></li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>• Introduce practice teach</li> <li>• Show checklist</li> <li>• Relate to reading</li> <li>• Practice teach in teams (10 min present, 10 min eval with check-list for each)</li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>• Practice teaching</li> <li>• Lecturettes (to large group, 10” present, 5” feedback)</li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>• Conducting QA course</li> <li>• Logistics preparation</li> <li>• Materials preparation</li> <li>• Documentation</li> <li>• <b>Midcourse assessment</b></li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>• Exercises continue (3)</li> </ul>	
30” Break	Break	Break	Break	Break	Break
<ul style="list-style-type: none"> <li>• <b>Assessment matrix</b></li> <li>• Large group</li> <li>• Examples of best/worst training approach</li> <li>• Mastery learning</li> <li>• Characteristics of competency-based training</li> <li>• Adult learning</li> <li>• Selecting QAP trainers</li> </ul>	<ul style="list-style-type: none"> <li>• Common findings from teaching</li> <li>• Stress key points of reading</li> <li>• How to give a lecturette</li> <li>• Survival tips for tomorrow’s practice teaching (use objectives, main points, AV, summary)</li> </ul>	<ul style="list-style-type: none"> <li>• Lecturettes continue</li> </ul>	<ul style="list-style-type: none"> <li>• Exercises start (45 minutes each, 3)</li> </ul>	<ul style="list-style-type: none"> <li>• Exercises continue (2-3)</li> </ul>	
Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
<ul style="list-style-type: none"> <li>• Form teams</li> <li>• Climate—Small case study</li> <li>• Needs of adult learners</li> <li>• Pre-course planning</li> <li>• Verbal/non-verbal communication</li> <li>• Followup training</li> <li>• Use of AV aids, examples</li> <li>• Explain tomorrow’s practice teaching, topic of choice, familiar</li> <li>• Summary</li> <li>• Assign Homework</li> </ul>	<ul style="list-style-type: none"> <li>• Training in teams</li> <li>• Why teams in training</li> <li>• Stages of team development</li> <li>• Characteristics of effective teams</li> <li>• Team roles</li> <li>• Interventions a trainer can make during training to support team (like coaching class)</li> <li>• Choose QA topics for tomorrow’s practice teaching</li> <li>• Prep time in class</li> <li>• Students choose from pre-made objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Competency based assessment</li> <li>• Use of pre-and mid-course assessments</li> <li>• Job aids during learning and work</li> <li>• Checklists for evaluation</li> <li>• Using small group techniques for training (role plays, exercises, case study)</li> <li>• Choose/schedule exercise practice teach</li> </ul>	<ul style="list-style-type: none"> <li>• Exercises continue (4)</li> </ul>	<ul style="list-style-type: none"> <li>• Exercises continue (4)</li> <li>• Course summary</li> <li>• Participant reaction forms (course eval)</li> <li>• Closure (certificate)</li> </ul>	
<b>Homework:</b> <ul style="list-style-type: none"> <li>• Read chapters 3 &amp; 4</li> </ul>	<b>Homework:</b> <ul style="list-style-type: none"> <li>• Prepare for teaching</li> </ul>	<b>Homework:</b> <ul style="list-style-type: none"> <li>• Prepare for exercises</li> </ul>	<b>Homework:</b> <ul style="list-style-type: none"> <li>• Prepare for remaining exercises</li> </ul>		

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
<ul style="list-style-type: none"> <li>Welcome</li> <li>Ground rules</li> <li>Objectives</li> <li>Overview</li> <li>Housekeeping</li> <li>Introductions</li> <li><b>Pre-course assessment</b></li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>Introduce practice teach</li> <li>Show checklist</li> <li>Relate to reading</li> <li>Practice teach in teams (10 min present, 10 min eval with check-list for each)</li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>Practice teaching</li> <li>Lecturettes (to large group, 10” present, 5” feedback)</li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>Competency based assessment</li> <li>Use of pre-and mid-course assessments</li> <li>Job aids during learning and work</li> <li>Checklists for evaluation</li> <li>Exercises start 45 min. each</li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>Conducting QA course</li> <li>Logistics preparation</li> <li>Materials preparation</li> <li>Documentation</li> <li><b>Midcourse assessment</b></li> </ul>	<b>Review/Preview</b> <ul style="list-style-type: none"> <li>Exercise 1 or more leftover</li> </ul>
30” Break	Break	Break	Break	Break	Break
<ul style="list-style-type: none"> <li><b>Assessment matrix</b></li> <li>Large group</li> <li>Examples of best/worst training approach</li> <li>Mastery learning</li> <li>Characteristics of competency-based training</li> <li>Adult learning</li> <li>Selecting QAP trainers</li> </ul>	<ul style="list-style-type: none"> <li>Common findings from teaching</li> <li>Stress key points of reading</li> <li>How to give a lecturette</li> <li>Survival tips for tomorrow’s practice teaching (use objectives, main points, AV, summary)</li> </ul>	<ul style="list-style-type: none"> <li>Lecturettes continue</li> </ul>	<ul style="list-style-type: none"> <li>Exercises continue (3)</li> </ul>	<ul style="list-style-type: none"> <li>Exercises continue (2-3)</li> </ul>	<ul style="list-style-type: none"> <li>Course summary</li> <li>Participant reaction forms (course eval)</li> <li>Closure (certificate)</li> </ul>
Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
<ul style="list-style-type: none"> <li>Form teams</li> <li>Climate—Small case study</li> <li>Needs of adult learners</li> <li>Pre-course planning</li> <li>Verbal/non-verbal communication</li> <li>Followup training</li> <li>Use of AV aids, examples</li> <li>Explain tomorrow’s practice teaching, topic of choice, familiar</li> <li>Summary</li> <li>Assign Homework</li> </ul>	<ul style="list-style-type: none"> <li>Training in teams</li> <li>Why teams in training</li> <li>Stages of team development</li> <li>Characteristics of effective teams</li> <li>Team roles</li> <li>Interventions a trainer can make during training to support team (like coaching class)</li> <li>Choose QA topics for tomorrow’s practice teaching</li> <li>Prep time in class</li> <li>Students choose from pre-made objectives</li> </ul>	<ul style="list-style-type: none"> <li>Using small group techniques for training (role plays, exercises, case study)</li> <li>Choose/schedule exercise practice teach</li> </ul>	<ul style="list-style-type: none"> <li>Exercises continue (4)</li> </ul>	<ul style="list-style-type: none"> <li>Exercises continue (4)</li> </ul>	
<b>Homework:</b> <ul style="list-style-type: none"> <li>Read chapters 3 &amp; 4</li> </ul>	<b>Homework:</b> <ul style="list-style-type: none"> <li>Prepare for teaching</li> </ul>	<b>Homework:</b> <ul style="list-style-type: none"> <li>Prepare for exercises</li> </ul>	<b>Homework:</b> <ul style="list-style-type: none"> <li>Prepare remaining exercises</li> </ul>		

# PRE-COURSE QUESTIONNAIRE

## HOW THE RESULTS WILL BE USED

The main objective of the **Pre-course Questionnaire** is to assist both the **trainer** and the **participant** as they begin their work together in the course by assessing what the participants, individually and as a group, know about the course topic. This allows the trainer to identify topics which may need additional emphasis during the course. Providing the results of the pre-course assessment to the participants enables them to focus on their individual learning needs. In addition, the questions alert participants to the content that will be presented in the course.

The questions are presented in the true-false format. A special form, the **Individual and Group Assessment Matrix**, is provided to record the scores of all course participants. Using this form, the trainer and participants can quickly chart the number of correct answers for each of the 34 questions. By examining the data in the matrix, the group members can easily determine their collective strengths and weaknesses and jointly plan with the trainer how to best use the course time to achieve the desired learning objectives.

**For the trainer**, the questionnaire results will identify particular topics which may need additional emphasis during the learning sessions. Conversely, for those categories where 85% or more of participants answer the questions correctly, the trainer may elect to use some of the allotted time for other purposes. For example, if the participants as a group did well (85% or more correct) in answering the questions in the category “Interactive Training Techniques”, the trainer may elect to assign **Chapter 4**, “Using Interactive Training Techniques” from the QA Training Skills reference manual as homework rather than discussing these topics in class.

**For the participants**, the learning objective(s) related to each question and the corresponding chapter(s) in the reference manual are noted beside the answer column. To make the best use of the limited course time, participants are encouraged to address their individual learning needs by studying the designated chapter(s).

# PRE-COURSE QUESTIONNAIRE

**Instructions:** In the space provided, print a capital **T** if the statement is **true** or a capital **F** if the statement is **false**.

## AN APPROACH TO QA TRAINING

1. Evaluating participant knowledge is the primary focus of competency-based training. \_\_\_\_\_ Participant Objective 1 (Chapter 1)
2. Practice is necessary for learning a new skill. \_\_\_\_\_ Participant Objective 1 (Chapter 1)
3. The mastery learning approach recognizes that not all of the participants will be able to master all of the learning objectives. \_\_\_\_\_ Participant Objective 1 (Chapter 1)
4. When the participant is able to perform a skill satisfactorily, but may not progress from step to step efficiently, s/he has attained skill competency. \_\_\_\_\_ Participant Objective 1 (Chapter 1)
5. To reduce evaluation apprehension among the participants, the trainer should refrain from assessing how well each individual is doing. \_\_\_\_\_ Participant Objective 1 (Chapter 1)
6. A verbal (one-way) lecture is more effective than an illustrated lecture (visual and verbal) in improving participant recall. \_\_\_\_\_ Participant Objective 1 (Chapter 1)

## CREATING A POSITIVE TRAINING CLIMATE

7. People learn best when they are actively involved in the training process. \_\_\_\_\_ Participant Objective 2 (Chapter 2)
8. It is the QA trainer's responsibility to design the course as part of planning for a positive training climate. \_\_\_\_\_ Participant Objective 2 (Chapter 2)
9. To encourage interaction among participants, classroom tables and chairs are most commonly arranged in a U-shape. \_\_\_\_\_ Participant Objective 2 (Chapter 2)
10. Warmup activities are used at the end of each training day to energize the participants. \_\_\_\_\_ Participant Objective 2 (Chapter 2)

## USING AUDIOVISUALS

11. One of the disadvantages of using the overhead projector is that classroom lights are off when the projector is being used. \_\_\_\_\_ Participant Objective 3 (Chapter 3)
12. When showing slides, set up and test the slide projector after the participants are seated. \_\_\_\_\_ Participant Objective 3 (Chapter 3)
13. Prior to showing a videotape to a group of participants, focus their attention on the reason for viewing the tape. \_\_\_\_\_ Participant Objective 3 (Chapter 3)
14. An advantage of using a flipchart is that a great deal of \_\_\_\_\_ Participant Objective 3

information can be presented on one page at one time.

(Chapter 3)

### **USING INTERACTIVE TRAINING TECHNIQUES**

- |     |                                                                                                  |       |                                        |
|-----|--------------------------------------------------------------------------------------------------|-------|----------------------------------------|
| 15. | The QA trainer should avoid asking questions of specific individuals as this may embarrass them. | _____ | Participant Objective 4<br>Chapter 4)  |
| 16. | Reviewing the lecture content is the first step in planning an illustrated lecture.              | _____ | Participant Objective 4<br>(Chapter 4) |
| 17. | Participant names should be used as often as possible when presenting an illustrated lecture.    | _____ | Participant Objective 4<br>(Chapter 4) |
| 18. | Small group activities require ground rules and instructions                                     | _____ | Participant Objective 5<br>(Chapter 4) |
| 19. | Written case studies can be used to develop effective problem-solving skills.                    | _____ | Participant Objective 5<br>(Chapter 4) |

### **USING COMPETENCY-BASED ASSESSMENTS**

- |     |                                                                                                                             |       |                                        |
|-----|-----------------------------------------------------------------------------------------------------------------------------|-------|----------------------------------------|
| 20. | While pre-course assessment of knowledge is important, it does not serve to motivate participants to acquire new knowledge. | _____ | Participant Objective 6<br>(Chapter 5) |
| 21. | A participant in a QA training course is more likely to use a job aid before using a checklist.                             | _____ | Participant Objective 6<br>(Chapter 5) |
| 22. | An effective QA coach/trainer does not continuously assess participant progress.                                            | _____ | Participant Objective 6<br>(Chapter 5) |
| 23. | The trainer(s) must be proficient in all of the skills and activities the participants are expected to learn.               | _____ | Participant Objective 6<br>(Chapter 5) |

### **TEAMS IN TRAINING**

- |     |                                                                                          |       |                                        |
|-----|------------------------------------------------------------------------------------------|-------|----------------------------------------|
| 24. | The norming stage is characterized by increased expressions of feelings.                 | _____ | Participant Objective 7<br>(Chapter 6) |
| 25. | The forming stage is characterized by arguing and competition among the group's members. | _____ | Participant Objective 7<br>(Chapter 6) |
| 26. | Team roles include time keeper.                                                          | _____ | Participant Objective 7<br>(Chapter 6) |

### **CONDUCTING A QA TRAINING COURSE**

- |     |                                                                                                    |       |                                        |
|-----|----------------------------------------------------------------------------------------------------|-------|----------------------------------------|
| 27. | The course syllabus provides a summary of the major components of a course.                        | _____ | Participant Objective 8<br>(Chapter 7) |
| 28. | The course content or essential need-to-know information in a training package is contained in the | _____ | Participant Objective 8<br>(Chapter 7) |

participant's handbook.

- |     |                                                                                       |       |                                        |
|-----|---------------------------------------------------------------------------------------|-------|----------------------------------------|
| 29. | The course outline is a teaching document.                                            | _____ | Participant Objective 8<br>(Chapter 7) |
| 30. | The first step in planning an effective training session is to review the objectives. | _____ | Participant Objective 8<br>(Chapter 7) |



**QA TRAINING SKILLS COURSE: INDIVIDUAL AND GROUP ASSESSMENT MATRIX**

COURSE: \_\_\_\_\_ DATES: \_\_\_\_\_ TRAINER(S) : \_\_\_\_\_

Question Number	Correct Answers (participants)																								CATEGORIES	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24		
1																										AN APPROACH TO QA TRAINING
2																										
3																										
4																										
5																										
6																										
7																										CREATING A POSITIVE TRAINING CLIMATE
8																										
9																										
10																										
11																										USING AUDIO-VISUALS
12																										
13																										
14																										

Question Number	Correct Answers (participants)																								CATEGORIES	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24		
15																										USING INTERACTIVE TRAINING TECHNIQUES
16																										
17																										
18																										
19																										
20																										USING COMPETENCY BASED ASSESSMENTS
21																										
22																										
23																										TEAMS IN TRAINING
24																										
25																										
26																										CONDUCTING A QA TRAINING COURSE
27																										
28																										
29																										
30																										

# **CASE STUDIES**

## **CASE STUDY 1: HOW AND WHY PEOPLE LEARN**

### **The Integrated Health Project**

You have been contracted by an international donor agency to conduct a training course for branch managers in a region of a country. Your first meetings have been with the local government health ministry staff who have outlined the need for strengthening of the project's Management Information Services (MIS). Initial discussions have included some discussion of the nature of the problem and you arrive at the training course aware that the donors and the local government wish to have more accurate reporting from the field and that your training will focus on the role of mid-managers in the delivery of health services. However, during the opening ceremony, the project coordinator makes several angry remarks about the lack of professionalism among management staff and threatens their job security if they don't do well in the training and "clean up" the mess in the reporting system.

## **CASE STUDY 2: CREATING A POSITIVE TRAINING CLIMATE**

### **The City Health Department**

You have traveled to a city to provide training to 15 staff members of the city health department in QA training skills. The course will involve some large group discussions as well as working in smaller teams. Many of the participants also have arrived early. When you go to set up the room, several of them accompany you and offer to help. You enter the room to find long rows of tables, all facing the front of the room where a podium is placed on a raised platform. The room is designed for groups of 60 to 100 people and the tables are positioned in the center of a very large room.

## **CASE STUDY 3: CREATING A POSITIVE TRAINING CLIMATE**

### **The Health District**

You are providing a 1-week training course on “Setting and Communicating Standards” for nurse-midwives in a health district. The participants are traveling from throughout the district. One bus with 12 participants breaks down on the way to the course and the group is stranded for most of the afternoon in the severe heat of the day. They arrive at the training center 4 hours late, very tired, hot and angry. You have delayed the beginning of your training and the six other participants have waited with you. The agenda is very full for the week and you are now worried about covering all of the material. When the 12 delayed people come into the room, several of the others immediately question them about why they have kept everyone waiting so long.

## **CASE STUDY 4: CREATING A POSITIVE TRAINING CLIMATE**

### **The Ministry of Health**

You have prepared a training course for 18 staff members of the Ministry of Health in “Quality Assurance Awareness.” You receive a list of the participants and their positions at the beginning of the course and become aware that there is considerable diversity within the group. It becomes obvious that there are very senior staff members as well as several junior ones. When the participants arrive, the women sit separately from the men and the younger staff members obviously show great respect for the four older and wait for them to initiate discussion or to lead the group in responding to suggestions or questions.

# JOB AIDS FOR CLASSROOM PRESENTATION AND LEADING EXERCISES

## USING THE JOB AIDS

The Job aids for Classroom Presentation and Leading Exercises are designed to help the participant learn and practice the skills involved in:

- Presenting an illustrated lecture
- Facilitating exercises

The participant is not expected to deliver the classroom presentation or facilitate small group work correctly the first time s/he practices them. Instead the job aids are intended to assist the participant in learning the key aspects of these training techniques.

The job aids can be used by participants to follow the trainer's demonstration of these instructional methods. Later in the course, participants can use the guides to critique one another as they prepare and practice their presentations which will be given for formal evaluation. These job aids include the same steps as the checklists which the trainer will use to evaluate each participant.

Because the job aids are used to assist in developing skills, it is important that the rating (scoring) be done carefully and as objectively as possible. The participant's performance of each step is rated on a three point scale as follows:

- 1 Needs Improvement:** Step or task not performed correctly or out of sequence (if necessary) or is omitted
- 2 Competently Performed:** Step or task performed correctly in proper sequence (if necessary) but participant does not progress from step to step efficiently
- 3 Proficiently Performed:** Step or task efficiently and precisely performed in proper sequence (if necessary)

# JOB AID FOR CLASSROOM PRESENTATION SKILLS

(To be completed by **Participants**)

<p><b>1 Needs Improvement:</b> Step or task not performed correctly or out of sequence (if necessary) or is omitted</p> <p><b>2 Competently Performed:</b> Step or task performed correctly in proper sequence (if necessary) but participant does not progress from step to step efficiently</p> <p><b>3 Proficiently Performed:</b> Step or task efficiently and precisely performed in proper sequence (if necessary)</p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

<b>CLASSROOM PRESENTATION SKILLS</b>					
<b>CONTENT ORGANIZATION</b>	<b>OBSERVATIONS</b>				
1. Presents an effective introduction—previews the topic					
2. States the objective(s) as part of the introduction					
3. Presents all information included in trainer notes or reference manual					
4. Uses periodic summarization during presentation of complex topics					
5. Checks participant understanding of main points before moving ahead					
6. Summarizes main points in conclusion					
7. Finishes presentation within allotted time					
<b>DELIVERY</b>					
8. Uses clear voice, loud enough for whole room to hear					
9. Speaks in a comfortable pace, not too slow or too fast					
10. Avoids talking to the overhead or screen					
11. Avoids reading materials from the overhead or screen					
12. Stands with comfortable posture					
13. Uses gestures calmly, without distracting viewers					
14. Moves about the room without being disruptive					
15. Encourages group participation with non-verbal cues					

<b>CLASSROOM PRESENTATION SKILLS</b>
--------------------------------------

16. Makes eye contact with people throughout the room	<b>OBSERVATIONS</b>				
17. Make sure flipcharts or overheads are readable even at the back of the room					
18. Summarizes main points on overheads/flip charts					
19. Uses pointers/pens without distraction (not hitting screen, clicking)					
<b>QUESTIONING</b>					
20. Asks questions of the entire group					
21. Uses questions to involve participants in discussion					
22. Responds to participant questions (does not ignore questions)					
23. Uses active listening and clarification to understand participant questions (listen attentively, request clarification, restate questions)					
24. Reflects some questions back to the group					
25. Answers questions with correct and sufficient detail					
26. Distinguishes between questions or topics that need to be addressed immediately and those that need to be put off until later					

# JOB AID FOR SKILLS USED IN LEADING EXERCISES

(To be completed by **Participants**)

<p><b>1 Needs Improvement:</b> Step or task not performed correctly or out of sequence (if necessary) or is omitted</p> <p><b>2 Competently Performed:</b> Step or task performed correctly in proper sequence (if necessary) but participant does not progress from step to step efficiently</p> <p><b>3 Proficiently Performed:</b> Step or task efficiently and precisely performed in proper sequence (if necessary)</p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

<b>SKILLS USED IN LEADING EXERCISES</b>					
	<b>OBSERVATIONS</b>				
1. Presents an effective introduction—previews the topic					
2. States the objective(s) as part of the introduction (unless to do so is inappropriate to the exercise)					
3. Presents all key information included in exercise guides					
4. Captures and reflects learning which the team develops through self-discovery					
5. If skills demonstration is required, never uses incorrect techniques					
6. Summarizes outcomes of the exercise and the application of the exercise to learning					
7. Projects voice so that all participants can hear					
8. Uses questions to involve participants in discussions					
9. Guides group appropriately when they require redirection on the task					
10. If team is organized with a leader and coach, allows those members to take action in redirecting and guiding the team; works through those members to provide guidance (trainer does not take over the team)					
11. When appropriate to the exercise, provides positive feedback on the steps or tasks the team performed well					
12. When appropriate to the exercise, provides specific suggestions for performance improvement					
13. Recognizes stages of team development and makes interventions appropriate to the team’s stage					



# JOB AIDS FOR CLASSROOM PRESENTATION AND LEADING EXERCISES

## USING THE JOB AIDS

The Job aids for Classroom Presentation and Leading Exercises are designed to help the participant learn and practice the skills involved in:

- Presenting an illustrated lecture
- Facilitating exercises

The participant is not expected to deliver the classroom presentation or facilitate small group work correctly the first time s/he practices them. Instead the job aids are intended to assist the participant in learning the key aspects of these training techniques.

The job aids can be used by participants to follow the trainer's demonstration of these instructional methods. Later in the course, participants can use the guides to critique one another as they prepare and practice their presentations which will be given for formal evaluation. These job aids include the same steps as the checklists which the trainer will use to evaluate each participant.

Because the job aids are used to assist in developing skills, it is important that the rating (scoring) be done carefully and as objectively as possible. The participant's performance of each step is rated on a three point scale as follows:

- 1 Needs Improvement:** Step or task not performed correctly or out of sequence (if necessary) or is omitted
- 2 Competently Performed:** Step or task performed correctly in proper sequence (if necessary) but participant does not progress from step to step efficiently
- 3 Proficiently Performed:** Step or task efficiently and precisely performed in proper sequence (if necessary)

# JOB AID FOR CLASSROOM PRESENTATION SKILLS

(To be completed by **Participants**)

<p><b>1 Needs Improvement:</b> Step or task not performed correctly or out of sequence (if necessary) or is omitted</p> <p><b>2 Competently Performed:</b> Step or task performed correctly in proper sequence (if necessary) but participant does not progress from step to step efficiently</p> <p><b>3 Proficiently Performed:</b> Step or task efficiently and precisely performed in proper sequence (if necessary)</p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

<b>CLASSROOM PRESENTATION SKILLS</b>					
<b>CONTENT ORGANIZATION</b>	<b>OBSERVATIONS</b>				
1. Presents an effective introduction—previews the topic					
2. States the objective(s) as part of the introduction					
3. Presents all information included in trainer notes or reference manual					
4. Uses periodic summarization during presentation of complex topics					
5. Checks participant understanding of main points before moving ahead					
6. Summarizes main points in conclusion					
7. Finishes presentation within allotted time					
<b>DELIVERY</b>					
8. Uses clear voice, loud enough for whole room to hear					
9. Speaks in a comfortable pace, not too slow or too fast					
10. Avoids talking to the overhead or screen					
11. Avoids reading materials from the overhead or screen					
12. Stands with comfortable posture					
13. Uses gestures calmly, without distracting viewers					
14. Moves about the room without being disruptive					
15. Encourages group participation with non-verbal cues					

<b>CLASSROOM PRESENTATION SKILLS</b>
--------------------------------------

16. Makes eye contact with people throughout the room	<b>OBSERVATIONS</b>				
17. Make sure flipcharts or overheads are readable even at the back of the room					
18. Summarizes main points on overheads/flip charts					
19. Uses pointers/pens without distraction (not hitting screen, clicking)					
<b>QUESTIONING</b>					
20. Asks questions of the entire group					
21. Uses questions to involve participants in discussion					
22. Responds to participant questions (does not ignore questions)					
23. Uses active listening and clarification to understand participant questions (listen attentively, request clarification, restate questions)					
24. Reflects some questions back to the group					
25. Answers questions with correct and sufficient detail					
26. Distinguishes between questions or topics that need to be addressed immediately and those that need to be put off until later					

# JOB AID FOR SKILLS USED IN LEADING EXERCISES

(To be completed by **Participants**)

<p><b>1 Needs Improvement:</b> Step or task not performed correctly or out of sequence (if necessary) or is omitted</p> <p><b>2 Competently Performed:</b> Step or task performed correctly in proper sequence (if necessary) but participant does not progress from step to step efficiently</p> <p><b>3 Proficiently Performed:</b> Step or task efficiently and precisely performed in proper sequence (if necessary)</p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

<b>SKILLS USED IN LEADING EXERCISES</b>					
	<b>OBSERVATIONS</b>				
1. Presents an effective introduction—previews the topic					
2. States the objective(s) as part of the introduction (unless to do so is inappropriate to the exercise)					
3. Presents all key information included in exercise guides					
4. Captures and reflects learning which the team develops through self-discovery					
5. If skills demonstration is required, never uses incorrect techniques					
6. Summarizes outcomes of the exercise and the application of the exercise to learning					
7. Projects voice so that all participants can hear					
8. Uses questions to involve participants in discussions					
9. Guides group appropriately when they require redirection on the task					
10. If team is organized with a leader and coach, allows those members to take action in redirecting and guiding the team; works through those members to provide guidance (trainer does not take over the team)					
11. When appropriate to the exercise, provides positive feedback on the steps or tasks the team performed well					
12. When appropriate to the exercise, provides specific suggestions for performance improvement					
13. Recognizes stages of team development and makes interventions appropriate to the team’s stage					

# TRAINING OF QA TRAINERS COURSE EVALUATION

(To be completed by **Participants**)

**Instructions:** Please indicate on a 1-5 scale your opinion of the following course components:

**5-Strongly agree   4-Agree   3-No opinion   2-Disagree   1-Strongly disagree**

COURSE COMPONENT	RATING
1. The Pre-course Questionnaire helped me to focus my study effectively	
2. The classroom instruction was adequate for learning classroom training skills	
3. The classroom instruction was adequate for learning skills used in leading exercises	
4. The practice teaching was adequate to practice and improve my classroom training skills	
5. The practice with leading exercises was adequate to practice and improve my skills in leading exercises	
6. There was sufficient time to prepare for practice teaching and exercise sessions	
7. I am now confident that I can plan, deliver, and document QA training	
8. I am now confident using job aids and checklists to assess participant progress in reaching skill competency	
9. I am now confident using pre- or midcourse questionnaires to assess participant progress in reaching knowledge competency	

## ADDITIONAL COMMENTS

1. What topics (if any) should be **added** (and why) to improve the course?
  
2. What topics (if any) should be **deleted** (and why) to improve the course?
  
3. What changes (if any) should be made to the design of the course (and why)?