Chapter 1 – An Approach to Quality Assurance Training

Slide 1

Training vs. Education

■ Training transfers knowledge and skills needed to carry out a specific task or activity.
  – It presumes immediate application.
■ Education provides a broad array of knowledge (and skills) to prepare for a future role

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Slide 2

Mastery Learning

■ Assumes that all student will master the needed knowledge and skills
■ Enables participants to have a self-directed learning experience
■ Uses a variety of teaching and training methods

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Slide 3

Mastery Learning Assessment

■ Competency-based
■ Dynamic
■ Less stressful

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Chapter 1 – An Approach to Quality Assurance Training

Slide 4

Competency-Based Training is Learning by Doing

Type of Presentation	Ability to Recall	
	After 3 Hours	After 3 Days
Verbal (one-way) lecture	25 %	10-20 %
Written (reading)	72%	10%
Visual and verbal (illustrated lecture)	80%	65%
Participatory (role plays, case studies, practice)	90%	70%

Slide 5

Coaching Skills

- Providing positive feedback
- Active listening
- Questioning
- Problem-solving

Slide 6

Responsibilities of the Trainer and Participants

- Trainer
  - Help each participant attain full competency
  - Facilitate learning
- Participants
  - Be actively involved in the learning process
  - Contribute what they already know

Slide 7

Criteria for Selecting QA Trainers

- Demonstrate proficiency in using QA skills
- An interest in training
- Humility

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Slide 8

Levels of Performance

Skill Acquisition	Knows the steps and sequence (if necessary) to perform the required skill or activity but needs assistance
Skill Competency	Knows the steps and their sequence (if necessary) and can perform the required skill or activity
Skill Proficiency	Knows the steps and their sequence (if necessary) and efficiently performs the required skill or activity

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Chapter 2 – Creating a Positive Training Climate

Slide 1

Positive Training Environment

■ Acknowledges how people learn
■ Encourages and is conducive to learning
■ Creates an atmosphere of safety - participants can ask questions
■ Gives responsibility for accomplishing course objectives to everyone participating

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Slide 2

Participant Expectations for Training

■ Training must be relevant
■ They will be motivated if the training is relevant
■ Participation and active involvement
■ Variety of learning experiences
■ Positive feedback
■ Personal concerns (safety, etc..)

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Slide 3

Expectation - cont.

■ Need recognition as individuals
■ Maintain self-esteem
■ High expectations of themselves and trainers
■ Personal needs

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Slide 4

Implications for Training

- The learning experience must relate directly to participant's job responsibilities
- Increase and channel motivation through clear training goals and objectives
- The learning experience must actively involve the participants in the training process

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Slide 5

How to Involve Participants

- Allow input regarding schedules, activities, and events
- Questioning and feedback
- Brainstorming and discussion
- Hands-on work
- Group and individual projects
- Classroom activities

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Slide 6

Implications - cont.

- Include a variety of training methods
- Provide time to give feedback
- Organize activities that will place participants at ease
  - Ice breakers
  - Expectations for the course
- Treat participants as individuals (examples - use participant names, involve participants as often as possible)

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Chapter 2 – Creating a Positive Training Climate

Slide 7

Implications - cont.

- Maintain participant self-esteem (example - avoid negative feedback)
- Respond to participant high expectations by talking (modestly) about your background and abilities
- Acknowledge and try to meet personal needs (examples - lighting, reducing tension)

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Slide 8

Planning Before the Course

- Obtain basic information about participants
- Review existing course materials
- Organize training site (physical resources)
- Anticipate needs or participants
- **Prepare yourself for the course**

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Slide 9

Participant Information

- How many participants?
- Why are participants enrolled?
- Experience and educational background?
- Types of QA activities participants will perform in their work?

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Chapter 2 – Creating a Positive Training Climate
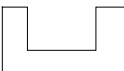
Slide 10

> **Physical Resources**
>
> - Is the training space size appropriate?
> - Is the room properly heated/cooled? Ventilated?
> - Writing board with chalk or markers?
> - Is lighting adequate?
> - Is there proper AV and demonstration equipment? Does everything function?

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Slide 11

> **Training Room Arrangement**
>
> - U-shaped
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> - Rectangular or circular
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> - Small Group

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Slide 12

> **Planning for Participant Needs**
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> - Are there physical barriers?
> - Will participants be able to see the AVs?
> - Will there be electricity?
> - Meals? Refreshments?
> - What is the policy regarding smoking or alcohol?

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Chapter 2 – Creating a Positive Training Climate

Slide 13

Participant Needs - cont.

- Restrooms available? Functioning?
- Telephones available? Functioning?
- Arrangements for emergencies? First aid kit?

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Slide 14

Trainer Pre-Course Preparation

- Update knowledge about course topics
- Review and refresh training skills, as appropriate
- Revise training aids as needed
- Prepare any personalized trainer's notes

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Slide 15

Maintaining a Positive Climate During Training

- Use an introductory course overview
- Include warm-up activities
- Use effective verbal and nonverbal communication
- Use humor
- Informal learning activities

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Slide 16

Effective Verbal Communication

- Vary voice pitch, tone and volume
- Use strong session introductions to capture interest
- Communicate on a personal level
- Incorporate participants' ideas and examples
- Avoid repeating words or phrases

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Slide 17

Effective Verbal Communication - cont.

- Vary the pace and delivery
- Make logical and smooth transitions between topics
- Give clear directions for all activities

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Slide 18

Effective Non-Verbal Communication

- Greet participants and make a positive first impression
- Use eye contact
- Use positive facial expressions
- Walk about the room
- Walk towards participants as they respond

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Slide 19

Effective Non-Verbal Communication - cont.

- Avoid distracting gestures or body language
- Limit the use of desks, lecterns, or podiums between you and the participants
- Display enthusiasm

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Slide 20

Use Humor

- Cartoons and transparencies related to topic
- Topic-related puns and stories
- Cartoons integrated into training handouts

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Slide 21

Continue Positive Training Climate After the Course

- If appropriate, ask participants how they will use their new knowledge and skills when they return to their workplace
- If possible, allow for providing follow-up after training

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Chapter 3 – Using Audiovisual Aids

Slide 1

Tips for Using a Write Board

- Keep the board clean
- Use color chalk and pens that participants can see well
- Write large enough to be seen in back of room
- Prepare complex drawings in advance
- Underline headings and important words

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Slide 2

Write Board Tips - cont.

- Do not talk while facing the board
- Do not block the participants' view of the board
- Allow sufficient time for participants to copy information

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Slide 3

Tips for Using a Flipchart

- Use wide-tipped pens or markers
- Print in block letters large enough to be seen from back of room
- Use different colored pens for contrast
- Use headings, boxes, cartoons, and borders
- Use bullets for items
- Leave white space; don't crowd the page

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Slide 4

Flipchart Tips - cont.

■ If prepared in advance, use every other page
■ Have masking tape available to tape up pages around the room
■ To hide a portion of the page, fold up lower portion of page and tape
■ Face participants, not the flipchart, while talking

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Slide 5

Guidelines for Making Transparencies

■ Limit the information on each transparency to one main idea and about 5-6 lines of type
■ Use large lettering
■ Print text
■ Make graphics and drawing large enough to be seen from back of room
■ Mount transparencies or insert in plastic holders

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Slide 6

Transparency Guidelines - cont.

■ Number transparencies to keep in order
■ Store transparencies in a box with a lid or in an envelope to protect from scratches
■ The trainer can a use a paper copy of the transparency to write notes and important points

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Slide 7

Tips for Using Overhead Projectors

- Before presentation, locate and check on/off switch
- Be sure there is extra projector bulb
- Focus and check position before presentation
- Turn the projector on after the transparency is placed on glass
- Turn it off before removing the transparency

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Slide 8

Projector Tips - cont.

- Face the participants, not the screen
- Show one point at a time, using paper to cover other points
- Use a pointer or pencil directly on the transparency
- Allow time for participants to read screen
- Turn off projector when transparencies are finished

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Slide 1

Purpose of a Training Introduction

- Capture the interest of participants
- Make participants aware of trainer expectations
- Help foster a positive training climate

Slide 2

Techniques for the Training Introductions

- Review the session objectives
- Ask a series of questions about the topic
- Relate the topic to previously covered content
- Share a personal experience
- Relate the topic to real-life experiences

Slide 3

Introduction Techniques - cont.

- Use a case study or small group activity
- Use a videotape or other AV aid
- Use imaginative transparencies
- Make a provocative statement
- Give a classroom demonstration
- Use a game, role play, or simulation
- Relate the topic to future work experiences

Slide 4

Summarizing a Training Session

The summary should:
- Be **brief**
- Draw together the **main points**
- **Involve** the participants

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Slide 5

Summary Techniques

- Ask participants for questions
- Ask questions of the participants
- Administer a practice exercise or test
- Use a game to review main points

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Slide 6

Effective Questioning Techniques

- Ask a question of the entire group
- Target the question to a specific participant by using his/her name
- State the question, pausing and then directing the question to a specific participant

The key is to avoid a pattern

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Slide 7

Question Techniques - cont.

- Use participant names
- Repeat a correct response
- Provide positive reinforcement
- If the answer is partially correct,
  - Give positive reinforcement for correct part
  - Improve the incorrect part or redirect to another participant

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Slide 8

Question Techniques - cont.

- If the answer is incorrect
  - Make a non-critical response
  - Restate the question to lead to the correct response
- If no response
  - Try some of the above techniques or
  - Redirect to another participant

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Slide 9

Cautions for Questioning

- When the trainer does not know the answer, acknowledge it
  - Do not make up an answer, research the correct answer after the training
- If a participant's question will take discussion off the topic, the trainer must decide if it is worthwhile
  - If yes, answer if there is time
  - If no, move the discussion back on topic

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Slide 10

Planning an Illustrated Lecture

Plan should include:
- The lecture objective(s)
- An outline of key points
- Questions to involve the participants
- Reminders of the participant activities, use of AV aids, etc.

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Slide 11

Effective Illustrated Lectures:

- Begin with a **strong introduction**
- Are followed by a **smooth transition**
- Follow the **planned outline**
- Use a variety of **AV aids**
- Include activities that **involve the participants**
- Conclude with **effective summary**

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Slide 12

Presentation Skills

- Follow the lecture plan and trainer notes
- Communicate on a personal level
- Maintain eye contact
- Project one's voice
- Avoid slang, repetitive words, phrases, or gestures
- Show enthusiasm
- Move about the room

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Slide 13

Presentation Skills - cont.

- Use appropriate AV aids
- Ask simple and challenging questions
- Provide positive feedback
- Use participant names when possible
- Use a positive sense of humor
- Provide smooth transitions
- Be an effective role model

Slide 14

Why Small Groups?

- Participants learn from each other
- Involves all participants
- Creates a sense of teamwork
- Provides a variety of viewpoints

Slide 15

How to Create Small Groups

- Assign participants to groups
- "Count off" method
- Ask participants to form own teams
- Ask participants to draw a group number or name

Slide 16

Small Group Activities

- Case studies
- Role plays
- Brainstorming
- Group Discussion

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Slide 1

Goal of QA Training

To assist health professionals in
learning to adapt QA techniques
in order to improve work
performance and service to
clients.

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Slide 2

How Learning is Measured

In mastery learning, learning is measured by:
- Initial assessment of general knowledge and skills in course topics.
- Continuous assessment of mastery of knowledge and skills defined in **course objectives**.

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Slide 3

Competency Assessment Terms

- Competent
- Indicator
- Performance indicator
- Competency based assessment

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Slide 4

Why Conduct Knowledge Assessments?

■ To determine participant knowledge at beginning of training (**pre-course questionnaire**)

■ To motivate the participant to acquire new knowledge necessary to meet learning objectives

■ To determine whether progress has been made toward objectives (**mid-course questionnaire**

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Slide 5

Skills Assessments

■ Based on **performance indicators**

■ Job aids such as **checklists** can be used to evaluate indicators for:
 – process
 – outcomes

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Slide 6

Three Levels of Performance

■ Skill acquisition

■ Skill competency

■ Skill proficiency

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Slide 7

Competency-based assessment
measures behaviors in a **realistic**
job-related situation

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Slide 8

**Competency-based
Assessment Instruments**

■ Break down tasks and activities into
essential steps

■ Focus on skills and activities that
participants typically perform on the job

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Slide 9

**Considerations for Using
Competency-based
Assessments**

■ Instruments require **time and effort**

■ Must be performed by **proficient** QA
trainers or coaches

■ Require **adequate number** of skilled QA
trainers or coaches

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Slide 10

Job Aids

- Individual process steps or skills required to perform a task or activity
- Help to learn correct skills and sequence (**skill acquisition**)
- Help to measure progressive learning (**skill competency**)

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Slide 11

Using Job Aids in Competency -based Training

- Ensures training based on process standards
- Standardizes training materials and aids
- Forms the basis of training exercises and practice sessions
- Can be used as self- or peer-assessment tools

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Slide 12

Using Checklists in Competency-based Training

- Focus only on key steps or skills
- Measure participant's **actual** mastery skills, not just capacity to perform
- Ensures that all participants skills are measured according to same standard
- Forms the basis of follow up observations and evaluations

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Slide 1

Team...□

"...a high-performing task group whose members are interdependent and share common performance objectives."

Francis & Young

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Slide 2

Why Teams in Training?

- Increasingly complex and multifaceted problems
- Integration of divergent points of view
- Collaboration
- Knowledge of process
- Open atmosphere
- Greater number of ideas
- Greater acceptance of solutions
- Higher implementation rate
- Able to tackle larger issues
- Mutual support
- Cooperation

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Slide 3
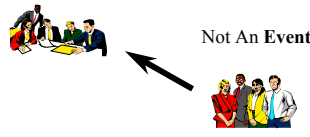
Three Types of Teams

- Innovative
- Work
- Problem-Solving

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Slide 4

Team Building

PROCESS of deliberately creating an effective team.

Not An **Event**

Slide 5

Characteristics of Effective Teams

- Clear role definition
- Careful time control
- Sensitivity to each other's needs and expressions
- Good preparation
- A high level of interest and commitment
- Few interruptions and distractions

Slide 6

Team Characteristics - cont.

- Periodically stop and assess their performance
- Members are recognized and appreciated
- Climate of trust and comfort

Slide 7

Stages of Team Development
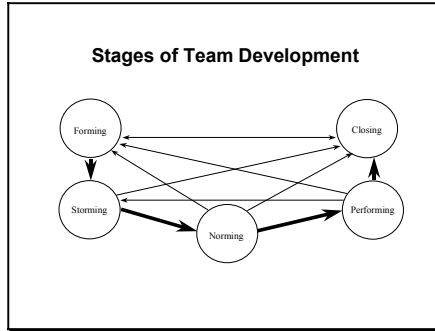
Slide 8

Stage 1: Forming

- Excitement
- Anticipation
- Optimism
- Anxiety
- Formal
- Attempts to define task
- Complaints

Slide 9

Stage 1: Forming

Useful Activities for Forming

1. Introduction/inclusion activities

2. Clarify the objectives or tasks

3. Establish groundrules

4. Provide any needed assistance

Slide 10

Stage 2: Storming

- Resistance
- Varying attitudes
- Arguing
- Defensiveness
- Competition
- Questioning purpose
- Unrealistic goal setting

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Slide 11

Stage 2: Storming

Useful Activities for Storming

- Conflict Management Techniques
- Clarification/Teaching of QA Concepts
- Encouragement of confrontation
- Clarification of tasks and goals

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Slide 12

Stage 3: Norming

- Acceptance of membership
- Relief
- Commitment to working out differences
- Feedback
- "Playful" interactions

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Slide 13

Stage 3: Norming

Useful Activities for Norming

1. Continue fostering shared responsibility

2. Refocus of the agenda

3. Provide training in QA Tools

Slide 14

Stage 4: Performing

■ Satisfaction

■ Trust

■ Anticipate Problems

■ Prevention

■ Risk Taking

■ Commitment to Process

Slide 15

Stage 4: Performing

Useful Activities for Performing

1. Training in QA Tools or Concepts as needed

Slide 16

Stage 5: Closing

- If successful:
  - joy, pride
  - loss
  - appreciation
  - avoid final closing

- If unsuccessful:
  - frustration, anger
  - denial, blame
  - disassociation

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Slide 17

Stage 5: Closing

Useful Activities for Closing

1. Discuss next Steps

2. Evaluate

3. Present results

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Slide 18

Individual Roles

Team Leader

Team Recorder

Timekeeper

Members

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Slide 1

QA Course Materials

- Reference manual
- Participant's handbook
- Trainer's guide
- Handouts
- Overheads
- Course syllabus
- Course outline
- Course schedule

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Slide 2

Planning for a Course

- Timeline
- Materials, supplies, and equipment
- Facility-based training

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Slide 3

Conducting a Training Session

- Review the session **objectives**
- Select **training activities**
- Write **instructions** for activities
- Organize **materials**
- Prepare **introduction**
- Develop **process questions**
- Develop a **summary**

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Slide 4

Competency-Based Assessments

- Knowledge assessment (pre- or midcourse questionnaire)
- Qualification is based on **observed** and **measured** performance
- Qualifications based on achievement in 3 areas
  - Knowledge
  - Skills
  - Practice

Slide 5

Evaluating the Course

- Evaluation of participant performance
- Evaluation of participant reaction to the course

Slide 6

Measuring Participant Reaction

- Daily reactions
- Session/trainer evaluations
- End-of-course written questionnaires
- End-of-course informal reactions
- Daily trainer meetings

Slide 7

Training Report Contents

- Name of training, location, dates
- Course agenda and/or schedule
- Attendance list
- Why training was conducted
- Objectives of training
- Description of major activities
- Interpretation of evaluations
- Problems, modifications, results, recommendations

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