

REQUIREMENTS FOR TRAINING REPORTS

APPENDIX C QUALITY ASSURANCE PROJECT

Training reports consist of the items and materials listed below.

Training reports are required for all QA Project classroom training of one day or greater. This includes training done in a facility.

Training reports are NOT required for just-in-time training.

The written report should contain the following information:

- Training course title, location, dates, sponsorship, trainer and cotrainer names, consultants or other advisors
- Statement about need for training: why was training the intervention, what performance gap was training designed to address
- Analysis of the trainer's evaluation of participants: includes comments about pre- and mid-course questionnaires with actions taken in response, as well as a summary of skill evaluations; indicate what portion of the participants demonstrated competency by meeting training objectives
- Analysis of participant reaction forms (course evaluations) and participant evaluation of the trainers
- Comments about any problems with the training, any modifications made to the course (time changes, content revisions), recommendations for improvements

These training materials should accompany the report:

- List of training materials used: reference manual or monograph, participant handbook and instructor manuals
- If the course used core materials without revision, do not send them; however, do send any materials added to a core course such as case materials, overhead transparencies, or references from outside the project

- If the course used materials (e.g. references, handbooks, manuals, exercises, audiovisual aids) developed uniquely for the course, do send them: include all instructions for new exercises
- Course syllabus, containing the goals and objectives (if not in a handbook/manual)
- Course outline (agenda), containing times and linked to the objectives (if not in a handbook / manual)
- List of participants and their institution / facility (you may keep addresses, phone numbers, etc. but these items are not required by the project)
- Blank copy of any tests, questionnaires, course evaluations (a summary of the results is placed in the report, individual forms are not submitted)

**REQUIREMENTS
FOR RETAINING
TRAINING REPORTS
AND MATERIALS**

APPENDIX D

**QUALITY ASSURANCE
PROJECT**

All training reports and materials that are submitted to headquarters will be kept in files there. Field offices should also keep files of the same items. See Appendix C for the contents of a training report and the training materials that should accompany the report.

Electronic files are an acceptable storage format. Preferred software is Word, PowerPoint and Excel. If no electronic copies are available, send paper.

Keep for your in-country files:

- A copy of everything you sent to QA Project headquarters
- Aggregated results of pre-course questionnaires - the matrix is preferred
- A record of mid-course questionnaire score for each person - (to prove participants achieved knowledge competency)
- Original checklists (to prove participants achieved skill competency)
- Aggregated results of participant reaction forms

Consider making a data base of participants, the facilities they represent, course date and course title, so you can tell in the future who has attended what courses.

GLOSSARY

Active Listening

Communication technique that stimulates open and frank exploration of ideas and feelings and enables trainers to establish trust and rapport with participants. In active listening, the trainer accepts what is being said without making any value judgments, clarifies the ideas or feelings being expressed and reflects these back to the participants.

Audiovisuals

Materials used to supplement learning activities that highlight key steps or information, reinforcing the learning process. They include writing boards, flipcharts, transparencies, slides and videotapes.

Brainstorming

Training strategy that stimulates thought and creativity and is often used in conjunction with group discussions. The primary purpose of brainstorming is to generate a list of ideas, thoughts or alternative solutions which focus on a specific topic or problem. Brainstorming requires that participants have some background related to the topic.

Case Study

Interactive training method that uses real scenarios which focus on a specific issue, topic or problem. Typically, participants read, study and react to the case study in writing or verbally during a group discussion.

Certification

Process for documenting that a participant can competently provide a service(s) (e.g., Design a QA Course). Certification is bestowed by an authorized organization (Ministry of Education or Health), educational institution (medical or nursing school) or agency. **Generally, training organizations do not certify participants.**

Checklist

Competency-based (skill) assessment instrument which is used to evaluate a participant's performance of QA skills or other observable behaviors (e.g., use of a QA tool). Checklists focus on the **key steps or tasks** of a skill or activity. They are used by trainers to evaluate objectively performance of a skill or activity.

Glossary

Competency	Demonstrated performance and application of knowledge to perform a required skill or activity to a specific predetermined standard.
Competency-Based Training (CBT)	Competency-based training is learning by doing . It emphasizes how the participant performs (i.e., a combination of knowledge and skills) rather than what information the participant has learned . In CBT, participants' progress is continually measured against pre-established performance criteria (standards).
Course Handbook (Participant)	Document that outlines the framework for a training course. It contains a course syllabus, schedule and outline as well as all supplemental printed materials (pre-course knowledge questionnaire, individual and group assessment matrix, learning guides and course evaluation) needed during the course.
Course Guide (Trainer)	Document that outlines the framework for conducting a training course and provides additional information and instructions for the trainer. A Trainer's Guide includes all the material given to the participant as well as the pre-course skills assessment; pre-course knowledge questionnaire answer key; mid-course knowledge questionnaire, answer sheet and answer key; and the participant evaluation checklist. Additionally the "Tips for Conducting the Course" section briefly summarizes general information on conducting a QA training course, being a good trainer and using interactive training techniques.
Course Outline	Detailed plan of topics to be presented in a course and how the training will be delivered. The course outline is a planning document .
Course Schedule	Brief day-by-day description of the major activities to be conducted in a training course. Information for the course schedule is taken from the course outline .
Course Syllabus	Summary of the major components of a course. The syllabus should be given to participants in advance of training. It is important that a syllabus accurately describe the course content, goals and objectives (also called a Course Description).
Demonstration (QA)	Interactive training in which the trainer explains and shows the steps and sequence (if necessary) required to perform a skill or activity. A variety of methods can be used to demonstrate an activity, including slides, videotape, and role play.

Discussion (Group)	Interactive training technique in which most of the ideas, thoughts, questions and answers are developed by the participants. The trainer serves as the facilitator and guides participants as the discussion develops.
Feedback	Communication technique in which the trainer (or coach) provides information to participants about their progress in mastering a skill or activity or achieving the learning objectives of the course. Feedback is most effective when it is timely (provided immediately), positive and descriptive.
Guided Practicum	Interactive training method in which the QA trainer supervises and coaches participants as they practice a skill or activity in the classroom or in an actual situation (e.g., providing feedback to participants in the classroom).
Illustrated Lecture	Training in which the content is derived largely from the knowledge-based learning area and presented verbally by the QA trainer. Its effectiveness as a training method is markedly enhanced through the use of questioning techniques and well-designed audiovisual aids.
Job Aid	Competency-based skill assessment instrument that focuses on QA skills (e.g., presenting QA tools) or other observable behaviors (e.g., counseling). Job Aids contain the individual steps or tasks in sequence (if necessary) required to perform a skill or activity in a standardized way. Job aids are designed to help the participant learn the correct steps and sequence in which they should be performed (skill acquisition) and measure progressive learning in small steps as s/he gains confidence and skill (skill competency).
Level One Trainer	Trainer who can impart both QA concepts, skills and QA training skills to others. S/he also should be knowledgeable and experienced in developing and conducting various types of QA courses. Generally, a level one trainer has been a QA coach, then a QA trainer and has completed an apprenticeship (i.e., cotrained) with a senior (level two) trainer.
Level Two Trainer	Trainer who can impart level one training skills as well as QA knowledge and skills to other professionals. S/he also should be knowledgeable and experienced in developing courses, conducting various types of training courses in QA and evaluating training. Generally, a level two trainer first has been

	<p>a proficient service provider, then a QA trainer and a level one trainer.</p>
Mastery Learning	<p>Approach to learning which is based on the premise that all participants can master (learn) the required knowledge or skill, provided sufficient time and appropriate training methods are used. The goal of mastery learning is that 100% of the participants will “master” (learn) the knowledge and skills on which the training is based.</p>
Mid-course Questionnaire	<p>Competency-based knowledge assessment that allows each participant (and the QA trainer) to determine the participants’ progress in mastering the course material.</p>
Participant	<p>Individual receiving training; also known as student, trainee or learner. (The term participant is preferred as it lends more respect to postgraduate health professionals receiving training.)</p>
Participatory Learning	<p>Method of training which actively involves participants in the learning process.</p>
Pre-course Questionnaire	<p>Competency-based knowledge assessment that is administered at the beginning of a course to determine what the participants, individually and as a group, know about the course topic. The assessment allows the QA trainer to identify particular topics which may need emphasis or, in many cases, require less classroom time during the course. Providing the results to participants enables them to focus on their individual learning needs.</p>
QA Training Skills Course	<p>Course during which proficient (expert) service providers (e.g., QA coaches, nurses) acquire the training skills needed to competently train other professionals in how to implement QA in their own workplace (e.g., design an intervention, set standards). In addition to providing training skills, the QA concepts and skills are standardized.</p>

QA Skills Course	Training course for individuals (e.g., QA coaches, nurses) during which they acquire the skills needed to competently implement QA in their workplace.
QA Skills Trainer	Trainer who can impart QA skills to service providers. A QA skills trainer must be proficient (expert) in QA concepts for which s/he will be providing training as well as competent in QA training skills. To become a QA skills trainer, the trainer must complete a training apprenticeship (i.e., cotraining) with a senior or level two trainer.
QA Coaching	Training technique which involves the use of active listening, positive feedback, questioning and problem-solving skills to ensure a positive training climate. The trainer/coach demonstrates desired performance standards, encourages openness to learning and continually assesses participant performance. An effective coach focuses on practical issues, encourages working together, works to reduce stress and sees her/himself as a facilitator of learning.
Questionnaire	Set of validated and reliable questions used to assess the participant's pre-course knowledge or to measure mastery of the course material (e.g., Pre- and Mid-course Questionnaires).
Reference Manual	Text containing essential, need-to-know information pertaining to a specific skill or activity (e.g., using a QA tool). The reference manual contains all of the information needed to conduct a training course in a logical manner. Because it serves as the text for participants and the "reference source" for the trainer, special handouts or supplemental materials are not needed.
Role Play	Interactive training method in which participants act out roles in a realistic situation related to learning objectives. A major advantage of this approach is that participants can experience a real life situation without taking real life risks.

Skill	Group of tasks which use motor functions and typically require the manipulation of instruments and equipment. Activity is often used synonymously, but may or may not require motor functions. Steps and Tasks are subcomponents of a skill and/or activity.
Skill Acquisition	Represents the initial phase in learning a new QA skill or activity. One or more practice sessions are needed for learning how to perform the required steps and the sequence (if necessary) in which they should be performed. Assistance and coaching are necessary to achieve correct performance of the skill or activity.
Skill Competency	Represents an intermediate phase in learning a new skill or activity. The participant can perform the required steps in the proper sequence (if necessary) but may not progress from step to step efficiently.
Skill Proficiency	Represents the final phase in learning a new skill or activity. The participant efficiently and precisely performs the steps in the proper sequence (if necessary). Proficiency is attained through repeated practice of the skill or activity. It usually is not obtainable in a basic (introductory) clinical or training skills course.
Standardization	Process of analyzing the essential steps in a skill or activity to determine the most efficient and safe way to perform it and train others.
Steps	Skills or activities broken down into specific assignments or duties. (Tasks often used synonymously.)
Tasks	Skills or activities broken down into specific assignments or duties. (Steps often used synonymously.)
Teaching	To impart or convey knowledge. This usually refers to instruction provided through classroom activities (often associated with preservice education programs).

Trainer	Person who has knowledge and skills in a specified subject area and the ability and training to impart them to others. Trainers are proficient (expert) in the skills and activities in which they provide training. In addition, they have received specialized training and practice in training skills.
Training	Learning which deals primarily with obtaining the knowledge and skills needed to carry out a specific activity. Training should be based on the assumption that there will be an immediate application of the physical or mental skill(s) being learned.
Training Package	Collection of materials used to conduct a course. Components of a training package include (but are not limited to) a reference manual; a course handbook for participants; a course guide for the trainer; audiovisual and other training aids (e.g., videotapes, slide sets and anatomic models); and competency-based assessment instruments.

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