



BROWN

Center for Learning & Professional Development  
Human Resources

## **Guide to Developing an Annual Training Plan**

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## Statement of Purpose

This guide represents a partnership between the Center of Learning & Professional Development and subject-matter experts (SMEs) at Brown University with a mutual goal of delivering outstanding learning and development opportunities to Brown staff. The purpose of the *Guide to Developing an Annual Training Plan* is to assist SMEs in analyzing, creating, planning and marketing training to be offered at the University. The guide serves to complement the Train the Trainer program offered by our department but may also be used by SMEs who seek guidance and who have not had the opportunity to participate in Train the Trainer.

For further assistance with any aspect of training development, please contact our office. Our staff information is listed below.

Heather Emerick  
Consultant  
Center for Learning & Professional Development  
Ext.3-2456  
[Heather\\_Emerick@brown.edu](mailto:Heather_Emerick@brown.edu)

Cynthia Yearwood  
Coordinator  
Center for Learning & Professional Development/Employee Programs  
Ext. 3-9376  
[Cynthia\\_Yearwood@brown.edu](mailto:Cynthia_Yearwood@brown.edu)

Judy Nabb  
Manager  
Center for Learning & Professional Development  
Ext. 3-9376  
[Judith\\_Nabb@brown.edu](mailto:Judith_Nabb@brown.edu)

Betsy Warner  
Director  
Compensation & Organizational Services  
Ext. 3-1792  
[Elizabeth\\_Warner@brown.edu](mailto:Elizabeth_Warner@brown.edu)

## Is an Informational or Training Program or Series the Solution?

**Directions:** Working through the following (5) steps will help you in determining if a training or informational program is the solution to a problem or issue your department is facing.

STEP	DESCRIPTION
<b>1. Define the Problem/Issue</b>	<ul style="list-style-type: none"> <li>Learn as much as possible about the problem/issue. This can be done formally by developing an assessment tool (Contact us for assistance.) or informally through conversations and other forms of feedback.</li> <li>Write a clear and concise problem/issue statement by stating the nature of the problem, its size, whom it affects and what the future will look like if nothing is done about it.</li> </ul>
<b>2. Filter Issue Through Department Mission Statement</b>	<ul style="list-style-type: none"> <li>Take a look at your department's mission statement. Think about the problem/issue in relation to your mission. Is there a connection?</li> <li>If the problem is aligned with the mission, then continue on to <b>STEP 3</b>.</li> <li>If the problem/issue is not aligned with your mission you have (2) options.</li> <li><b>Option 1:</b> Perhaps after clarification, the issue really belongs to another area or department. Refer this problem/issue to the proper area.</li> <li><b>Option 2:</b> Perhaps your mission statement needs to be revisited and revised to meet the changing needs of the organization.</li> </ul>
<b>3. Brainstorm Strategies for Solving the Problem/Issue</b>	<ul style="list-style-type: none"> <li>Brainstorm with staff to identify as many strategies as possible for solving the problem/issue.</li> <li>Decide which strategy will best solve the problem/issue given time and resources available.</li> </ul>
<b>4. Implement Strategy</b>	<ul style="list-style-type: none"> <li>If the strategy is to implement a training program(s) then use the <b>Analyzing a Training Requirement Worksheet pages 3-5</b> to further plan for a specific program or series of programs.</li> <li>If the strategy is to implement a new process, procedure or policy, then be sure to determine the major activities needed to carry out the strategy, set deadlines, prepare a budget and so on.</li> </ul>
<b>5. Evaluate</b>	<ul style="list-style-type: none"> <li>After implementing a new training program (s) or other strategy, it is important to evaluate the effectiveness of the program/strategy.</li> <li>Did the strategy/training solve the problem? Evaluation provides the data needed to determine if the program/ strategy should be continued, modified or discontinued.</li> </ul>

## Analyzing the Training Requirement Worksheet

**Directions:** This table summarizes the (6) steps involved in analyzing a training requirement. Detailed points for the (6) steps for analyzing a training requirement are listed with space for you to complete the worksheet after the table summary.

Element	Description
<b>1. Statement of training need</b>	<ul style="list-style-type: none"> <li>The statement of the training need given by the person who requests the training.</li> </ul>
<b>2. Why is training required?</b>	<ul style="list-style-type: none"> <li>What are the consequences of providing or not providing the training?</li> <li>What are the desired effects of the training on the learners' job performance?</li> </ul>
<b>3. Who are the learners?</b>	<ul style="list-style-type: none"> <li>Identify the learners in terms of their familiarity with the training content and try to anticipate their reaction to the training.</li> </ul>
<b>4. What's the training content?</b>	<ul style="list-style-type: none"> <li>The nature of the training content, possible resources and any anticipated difficulties in developing the content.</li> </ul>
<b>5. What are the timing issues?</b>	<ul style="list-style-type: none"> <li>This includes the start date, the length and frequency of training and any known timing issues.</li> </ul>
<b>6. Where will the training be conducted?</b>	<ul style="list-style-type: none"> <li>The location and number of learners, an assessment of the space, equipment and other resources needed and available.</li> </ul>

1. Statement of training need as requested:

2. Why is the training required?

- Source of the request
  
  
  
- Expected benefits

- Negative consequences if training is not delivered

- New/changed behavior/skill desired

### 3. Who are the learners?

- Areas represented

- Size of group

- Familiarity with training content (existing skill level)

### 4. What is the training content?

- Content

- Resources (documentation, subject-matter experts, training packages, the web)

- Issues/challenges in designing content

- Anticipated reactions/challenges with content/training

5. What are the timing issues?

- Start date
- Length of the training
- Frequency of the training
- Other timing issues

6. Where will the training be conducted?

- Physical location
- Estimated number of learners
- Resources & equipment needed e.g. flip charts, markers, laptop, projector and so on
- Room set-up (contact our office for assistance.)

## Steps to Developing an Annual Training Plan

**Directions:** The following steps have been designed to assist departments who conduct a significant amount of training create an annual training plan.

STEP	DESCRIPTION
<b>1. Think about the Big Picture</b>	<ul style="list-style-type: none"> <li>• Begin by listing all of the programs your department will offer staff over the upcoming fiscal year.</li> <li>• Consider budget and time constraints along with the amount of time the subject matter facilitator(s) will need to develop and prepare. In doing so prioritize and determine what can realistically be accomplished during the budget year.</li> <li>• Subject matter experts who are new to developing and facilitating training, should participate in <b>Train the Trainer</b>. Contact our office for details.</li> </ul>
<b>2. Develop Preliminary Training Plan</b>	<ul style="list-style-type: none"> <li>• Devise a preliminary training plan by placing all of the programs to be offered on a department training calendar, include the length of the program(s), tentative date(s), time, location and facilitator(s).</li> <li>• Think about the impact the training plan will have on the other annual and day-to-day functions of the department. Modify plan as necessary.</li> </ul>
<b>3. Cross-check with University Calendar</b>	<ul style="list-style-type: none"> <li>• Cross-check the preliminary training plan with the University Calendar, "Training" for staff. See Appendix for detailed information, Depending on your training audience and what's happening on campus, you may need to change program dates.</li> </ul>
<b>4. Post Program Dates &amp; Descriptions</b>	<ul style="list-style-type: none"> <li>• Post program date(s) on the University Calendar "Training Events" for the upcoming semester or calendar year. See Appendix A for steps to posting to University Calendar.</li> <li>• Submit your course to training.brown.edu, the centralized, registration system.</li> </ul>
<b>5. Market Program(s)</b>	<ul style="list-style-type: none"> <li>• At least (3) weeks prior to any program session, alert your audience of the upcoming session by using the following resources:             <ul style="list-style-type: none"> <li>• Morning Mail</li> <li>• Specialized, accurate distribution list(s)</li> <li>• Individual email invitations</li> <li>• Telephone</li> <li>• Department meetings or "user" group meetings</li> <li>• Word of mouth</li> </ul> </li> </ul>
<b>6. Evaluate</b>	<ul style="list-style-type: none"> <li>• After any program session or series, you will want to evaluate the learning that took place, make program(s) modifications and collect data to help determine whether or not to continue running the program(s). For more information on evaluation tools, contact our office.</li> </ul>

## Appendix A: Steps to Posting to Training Events (University Calendar)

The Training Events calendar is a subset of the main “Events at Brown” calendar (<http://www.brown.edu/webmaster/calendar/>). Select “Main Calendar” in the top left hand corner. On this page, you will see a pull down menu on the right that allows you to select the Training calendar. The Training calendar is a central location where all training opportunities should be listed. Each listing connects to the Center for Learning and Professional Development website (or appropriate website) for more information about specific classes.

We would like to encourage you to look at the calendar before planning a training event to ensure that there aren't any conflicts with any other previously scheduled training event based on your intended audience. We also encourage you to submit your training event to the Training calendar so that members of the Brown community can peruse all of the training opportunities in one place. Submitted events will be reviewed and added to the calendar on a frequent basis.

### **To Submit Your Event**

Click the “Submit Event” button to bring up the “Submit Event” screen. Events entered into the “Submit Event” screen must first be approved by a user with at least “write” access before they become visible to other users with only “read” access. The calendar is checked frequently by users with “write” access who can approve your event. Please note that two staff members at the Center for Learning & Professional Development have been given “write” access to the training calendar and frequently check for submissions.

The “Submit Event” screen contains the following fields:

**Select a Calendar:** Select the calendar into which this event should be added.

**Date:** Choose a date from the pull-down menus. (By default, the today's date will be highlighted in the menus.)

**Start Time:** Choose a start time, if appropriate.

**End Time:** Choose an end time, if appropriate.

**Repeat:** If this is a recurring event, first select the appropriate type of repeating period from the pull-down menu (for example, every week or every Monday, Wednesday, and Friday). Then, specify how far into the future the event should repeat. To quantify how many times the event should repeat, move the radio button to the “Times to Repeat” option and type the number of times the event should appear in the calendar into the appropriate field. To specify an end date instead, move the radio button to the “Repeat Until” option and highlight the end date in the pull-down menus.

As an example, to add a recurring event for September 5<sup>th</sup> through 7<sup>th</sup>, you would add an event on September 5<sup>th</sup> and select the 'Repeat: Every Day' option from the pull-down

menu. Then, either type “3” in the “Times to Repeat” field or select “September 7<sup>th</sup>” from the “Repeat Until” pull-down menu.

**Event Title:** Type in the title of the event (e.g. “X-Files Premiere”).

**Category:** Designate a category for this event to be filtered on or leave the category unspecified. (The list of available categories is created and maintained by the Site Administrator.)

**Description:** Enter a description of the event (or other details including location, cost, contact phone numbers, attendees, etc.)

**Custom Field(s):** Any custom fields (such as location or price) created by the Site Administrator will follow the event description field.

**Your Name:** Enter your name (as the person associated with and/or responsible for the event).

**Your Email:** Enter your email address (as the person associated with and/or responsible for the event).

Click the “Submit Event” button to submit your event to the calendar for approval by a user with at least “write” access. Or click “Cancel” to cancel the changes to this screen and return to the calendar view.

**Questions:** Please contact our office for assistance.

## Appendix B: Developing an Annual Training Program Check Sheet

Program Name	Big Picture	Develop Plan	Dates Checked	Dates & Descriptions	Market Focus	Evaluate
1.						
2.						
3.						
4.						
5.						

Notes: