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NEON Training Plan

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Change Record

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1 INTRODUCTION

Describe the purpose of the training plan and how the document is organized.

For example: "This Training Plan outlines the steps required to design, develop and deliver the required training for users of the [insert your solution / product]. The Training Plan outlines the objectives, needs, strategy, and curriculum to be addressed when training users on the new or enhanced system."

Defining your goals will ensure that your training plan provides a sound basis for choosing appropriate evaluation methods and success criteria. In other words, trainees will know in which direction they are moving and the trainers will know whether they are getting there. This means that evaluating the success of the training program becomes much easier as you have defined exactly what you want to achieve and have identified the success criteria for both the trainers and trainees.

Your learning objective should contain the following elements.

- Performance - An objective highlights to the trainee what they are expected to do and how it will be measured. The objective sometimes describes the product or result of an action (for example, print a document in reverse order, if the training course is about Microsoft Word). Use words such as state, describe, list, compare, and explain to describe actions that your trainees might do.
- Conditions - An objective may describes conditions (if any) under which the performance occurs (for example, when and how to contact a customer if they are late in paying their credit card bill.)
- Criterion - Wherever possible, an objective might describes the criterion of acceptable performance by describing how well the trainee must perform in order to be considered acceptable (for example, answer X number of telephone calls within 20 minutes).

1.1 Background

Provide a general description of the solution / product to which this training applies. Include explanatory information on the training curriculum and cross-reference to spreadsheets and other project documents.



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1.2 Scope

Describe the project and/or organizational boundaries that impact the training plan. Clarify areas that are in and out of scope.

For example, your training plan may cover the following areas:

- Audience
- Objectives
- Course material
- Delivery Method
- Duration / Class Size
- Schedule
- Technical Requirements
- Assessments

Your training plan can also focus on the modules your course will cover:

- Accounts Payable
- Accounts Receivable
- Cash Collections
- General Ledger
- Project Costing

1.3 Objectives

Describe the objectives and/or expected results that this training plan will achieve. Aims and objectives are essential for designing an effective Training Plan. Without understanding the purpose and expected results of the training, projects can over-run, costs can spiral and staff members will be unable to perform their duties.

Smart Method for Creating Objectives

Use SMART to set objectives. SMART stands for:

Specific – Objectives should specify what they want to achieve.

Measurable – You should be able to measure whether you are meeting the objectives.

Achievable - Are the objectives achievable and attainable?

Realistic – Can you achieve the objectives with your current resources?

Time – When do you want to achieve the set objectives?



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Clearly defined aims and objectives ensure that there is a sound basis for the selection and/or design of materials, content and methods.

Difference between Aims and Objectives

Aim – this is a general statement of intent. It describes the direction in which the trainee will go in terms of what they might learn or what the training will do.

Objective – this is a more specific statement about what the trainee should, or will be able to do, after the training experience.

Aims and objectives play a vital role in planning the following:

- Training program
- Training course
- Training events for individual learners
- Methods of evaluation

Identify the tasks (for example, new skills that will be acquired) that users will be expected to perform after they have completed the training.

Define the success criteria for this training program:

- Success Criteria # 1 – e.g. trainee scored 75% in Word proficiency test
- Success Criteria # 2 – e.g. trainee completes all activities within 1 hour
- Success Criteria # 3 – e.g. trainee scored 75% in 4 modules

1.4 Assumptions

Describe the assumptions you have made when preparing this plan, for example:

- Every employee that will use the new [product] will attend / complete the requisite training.
- Additional and/or remedial training will be provided to ensure all users are adequately trained and can successfully operate the new [product].
- Project Sponsors will help define and drive the training plan.
- Sufficient funding will be budgeted to support training.
- Line Managers will be responsible for ensuring their personnel attend training.
- Line Managers will identify prospective trainees and release them as per the course schedule.
- A training sandbox will be available for trainees to practice new skills after completing their required classes.



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1.5 Points of Contact

Identify the points of contact (POCs) that may be needed by the reader for informational purposes.

Role	Name	Email	Telephone

1.6 Assumptions

Assumptions define conditions not known but under which the training plan is planned, budgeted, and managed. The following assumptions and constraints underlie the training plan for [project]. Changes to these factors may affect the cost, schedule, or scope of the work.

Ref #	Assumption	Impact

1.7 Constraints

Constraints are factors that restrict the project by scope, resource, or schedule.

Ref #	Constraint	Impact

Describe constraints under which the training plan must be conducted, such as timeframes, deadlines, funding, skill levels, resource, schedule, and budget.



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2 RELATED DOCUMENTS AND ACRONYMS

(If you want to reference other documents, drawings or product tree then include filenames here. Clearly show areas of responsibility between product teams on site/floor plans, data flow diagrams, pipeline diagrams, etc.).

2.1 Applicable Documents

AD[01]	
AD[02]	
AD[03]	
AD[04]	

2.2 Reference Documents

RD[01]	NEON.DOC.000008	NEON Acronym List
RD[02}	NEON.DOC.000243	NEON Glossary of Terms
RD[03]		
RD[04]		

2.3 Acronyms

Insert table for definitions of acronyms not found in RD[01}, if none, delete heading.

2.4 Verb Convention

"Shall" is used whenever a specification expresses a provision that is binding. The verbs "should" and "may" express non-mandatory provisions. "Will" is used to express a declaration of purpose on the part of the design activity.



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3 TRAINING REQUIREMENTS

Identify the audience (e.g. end-users, system administrator etc.) and their level of proficiency with the product/system. State the time frame in which training must be accomplished, for example, if it needs to be completed before a system goes live or before a specific date.

3.1 Audience

Describe the intended audience(s) for this training plan, broken out by department units and user types.

3.2 Roles and Responsibilities

Identify the roles and responsibilities of the training staff, such as content development, classroom presentation, ensuring compliance.

Identify others sources of information, such as members of the development team or Subject Matter Experts that may assist in content development and/or performing actual training where required.

3.3 Training Evaluation

Describe how training evaluation will be performed. This is to ensure that all attendees are assessed after training and can perform their work tasks successfully.

Identify the tools, forms, metrics that will be used to perform this evaluation.

Describe how the course material may be revised and updated based on feedback following the evaluation process.

3.4 Delivery Method

Describe how training will be delivered, e.g. in a class-room environment, web-based sessions, or on their own PCs.

3.5 Materials

Outline course materials, such as user guides, PowerPoint slides and other documents that will be used to deliver the training.

NOTE: Ensure that you have username and password for intranets and/or websites that form part of the training course.

3.6 Duration

Outline the duration and location of the training, for example, Monday – Friday between 9:30 - 4:00 at the company headquarters.



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3.7 Size

Outline the number of attendees per session. Highlight the importance of not exceeding this number as the quality of training may be negatively impacted by higher numbers.

3.8 Facilities

Describe where training will be conducted. Highlight technical resources you may need at these locations, such as flip carts, computers, intranet access, and white boards.

3.9 Instructor Evaluation

Circulate a course evaluation form to each trainee upon completion of the training session. Use this form to gather feedback on the instructor, course outline, quality of content, and materials provided. Use this feedback to update and/or improve future training sessions.

3.10 Updates

Identify the individuals who will update the training course as/when required.

3.11 Staffing

Identify the trainer(s) will be deliver the training course.



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4 INSTRUCTIONAL ANALYSIS

4.1 Development Approach

Discuss the approach used to develop the course curriculum and training products. Outline the methodology used to analyze training requirements in terms of objectives for each target group. Identify the topics or subjects on which the training will be conducted.

4.2 Issues and Recommendations

Outline any current and foreseeable issues relating to the training. Identify recommendations for resolving each issue. Highlight constraints and limitations where appropriate.

4.3 Needs and Skills Analysis

Describe the target audiences for each course module. These may include: IT experts, end-users, and executives depending on the type of material you’re developing. Discuss the training needs for each target audience. If appropriate, discuss needs and courses in terms of staff location, such as headquarters and regional offices. Describe the tasks that will be taught to meet objectives successfully and the skills that will be learned to accomplish those tasks.

NOTE: Use a matrix to provide this information if necessary.



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5 TRAINING STRATEGY

Describe the type of training (e.g., web, classroom) and the training schedule (duration, sites, and dates). Some factors to document include details of the training facilities, access to networks, intranet and websites, as well as security clearance and physical access to buildings.

5.1 Training Sources

Describe the training provider. Training may be internal (course developed in-house) or external (contracted to external training agencies). Capture the name, contact details and other relevant details.

5.2 Pilot Training

Once the training content is developed, present it to a test group such as the Training Manager, IT development team members, end-users or members of the target audience. Describe the proposed pilot class (audience, location, date, etc). Revise the training based on their feedback.

5.3 Dependencies / Constraints / Limitations

Identify all known dependencies, constraints, and or limitations that could potentially affect training delivery.



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6 TRAINING SCHEDULE

Outline the high-level training schedule including the main activities involved in the course:

- Curriculum Design
- Develop Training Material / Pilot classes
- Deliver Foundation and Prerequisite Courses
- Instructor Preparation and Training
- Deliver Classroom Training
- Develop Evaluation Program
- Execute Training Evaluation Program
- Develop Training Environment Infrastructure

6.1 Training Program Activities

Outline the estimated time frames for the overall training program activities.

Sequence	Activity	Start Date	End Date
1	Complete Skills Assessment		
2	Define audience size by module		
3	Develop project plan		
4	Develop course designs		
5	Develop training material		
6	Refine training material		
7	Deliver training to users		
8	Review feedback		
9	Refine training material		
10	Submit to documentation repository		



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6.2 Foundation / Pre-requisite Activities

Describe the foundation and prerequisite courses that need to be developed and delivered in advance of the training.

Sequence	Activity	Start Date	End Date
1	Complete Skills Assessment		
2	Define audience		
3	Develop project plan		
4	Develop course designs		
5	Develop pre-requisite training material		
6	Refine training material		
7	Deliver training to users		
8	Review feedback		
9	Refine training material		
10	Submit to documentation repository		



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7 TRAINING RESOURCES

Identify the resources required for the trainer to prepare the training program. This may include hardware, software, documentation, and other resources required to understand the product and deliver the training course successfully. Identify other potential resources.

7.1 Software Requirements

Identify the software required to prepare / deliver the training program.

- Software package
- Software package
- Software package

7.2 Hardware / Network Requirements

Identify the hardware / network required to prepare / deliver the training program.

- Servers
- Connectivity
- Other requirements

7.3 Trainer Requirements

Identify items required to prepare / deliver the training program.

- Flipcharts
- Overhead Projectors
- Laptop

8 TRAINING ENVIRONMENT

Describe the equipment and conditions required for the training, including installations, facilities, and dedicated workstations.

Identify any actions required by other groups, such as Tech Support, to ensure equipment is in place and specified conditions are met before the training course can begin.



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9 TRAINING MATERIALS

Describe training materials required for the course, such as overhead projectors, handouts, workbooks and computers.

The training materials and curriculum should accurately reflect the system upon which the training is based.

- Develop a user guide for the trainees. This can be used as a reference during and after the course.
- Develop an instructor guide. This is very useful for future trainers who may not be as proficient with the system as the current trainer.

9.1 Updating Training Materials

As training materials are subject to the same configuration management process as other system documentation, they should remain in line with changes to system enhancements. To accomplish this, the training team should ensure that training materials are updated before the next training program.

Describe the change release process and how training materials will be updated.



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10 TRAINING SECURITY

Describe the security aspects of the training program, for example, users will not receive passwords to the training environment until they attend their first class.

10.1 Access to Training Material

Outline how the Training Team will define and publish the training security process and rules. Access to master copies must be controlled and limited to the training team. Changes to training material must be approved and documented.

10.2 Access to Training Environment

Describe how access to the training environments will be controlled.

10.3 Training Classes

Describe how trainees will receive their security access as part of their training classes.

10.4 Process Practice after Classes

Describe how access to the training sandbox will be provided.
Identify the objectives:

- By 2009, increase by 75% the percentage of children that are appropriately immunized.
- By 2010, increase by 50% the percentage of HIV-infected persons identified through enhanced outreach strategies.
- By 2011, increase by 200% the percentage of people with diabetes who have had an examination in the past year.

Table 1 Style is "List"

Figure 1 Style is "List 2"