

## PEER TRAINING CHECKLIST

Use this checklist to prepare a peer training plan step-by-step.

1. Determine the training goal
  - “Big picture” that needs to be reached
  - Should tie in with library’s mission or strategic plan
2. Determine the training objective
  - Specific
  - Defines what needs to be trained
3. Assess needs of trainees
  - What is the gap between the training objective and what they already know?
  - Possible methods to assess training needs: surveys, pre-test of skills, measures of demand, focus groups with staff, observation, supervisor input
  - What is the range of skills and aptitudes in the target trainee audience?
4. Identify experts needed in development of training for this objective
  - Content expertise—Is it relevant and correct?
  - Design expertise—Is it clear and interesting?
  - Delivery expertise—Is it interesting and engaging? How will new trainers be prepared?
5. Identify trainers
  - What skills are needed? (positive attitude toward learning, aptitude for learning to train, knowledge level beyond learners or ability to learn it quickly)
  - How many trainers are needed?
    - a. How many sessions will be required?
    - b. Will training be given repeatedly over extended period of time?
    - c. Are additional classroom coaches needed?
  - From where in the organization?
    - a. Key locations or all locations in order to distribute expert staff coaches?
    - b. Cohesive group located in one place?
    - c. Public service staff or staff in a particular support unit?
6. Recruit trainers
  - Give the “big picture” and their role in it.
  - Tell them specifically and personally what they would bring to the project.
  - Describe what they will gain from the experience.
  - Describe the support provided.
  - Address their doubts, and ask what they need.
7. Design the training
  - Expert(s) and trainer(s) work together to design materials that present reliable content using language and learning segments understandable to the learners.

- Test draft training materials for the following qualities:
    - a. “Leave none behind” design insures that the slowest learners will feel successful for the first half or more of the lesson.
    - b. Arrangement builds logically.
    - c. Transitions create relationship between topics.
    - d. Time schedule works.
8. Support Trainer Preparation: possible methods include,
- Ask what they need to be successful.
  - Provide orientation and training.
  - Pair new trainers with experienced trainers.
  - Offer multiple ways to prepare, such as observe expert trainer first, or start with a small training group.
  - Use trainer teams, and allow them to practice together.
  - Allow new trainers to start by teaching one or two small segments of the training as part of a training pair or team.
9. Plan Roll-Out, and Implement Training
- Scheduling
    - a. What times will bring maximum participation?
    - b. Can the training be offered at more than one time, or multiple times?
    - c. Announce training dates at least 6 weeks in advance.
  - Recruitment of participants: plan your pitch
    - a. How will the trainee benefit?
    - b. How will the supervisor or unit benefit?
  - Plan details thoroughly for smooth implementation
    - a. Write up instructions and tip sheets for the trainers, such as routine steps for introducing the workshop session, where supplies are kept, sample lesson timeline for keeping the session on schedule, phone number of IT staff for troubleshooting.
    - b. Delegate to enough people so that more than one person knows what to do, and no one is too burdened to be successful.
    - c. Put communication in place through a training manager for the project or series, trainer e-mail groups, or other methods identified by the training team.
  - Plan follow-up for learners and trainers
    - a. Learners: How will they practice? How will they know if they got it?
    - b. Trainers: What did they learn? What would they do differently?
10. Evaluate the training results. Possible methods include:
- Survey participants after training and after a period of time
  - Ask trainers their experience of the lesson design and trainee performance
  - Give post-test of skills and compare to pre-test
  - Collect supervisor feedback
11. Congratulate, acknowledge and report results, personally thank, and celebrate!