

GOOD PRACTICE BRIEF

MARCH 2021

# WORKING AS A TEAM TO DESIGN AND PRODUCE LEARNING EVENTS

## KEY TAKEAWAYS

Assign and agree on roles and responsibilities for each member and define avenues for input on module and session design to mitigate confusion and ambiguity.

Track progress on each aspect of the training design and delivery to ensure the team operates under the same timeline and expectations.

Develop a knowledge management process so that all team members are able to easily access and develop relevant planning documents.

Encourage open, transparent, and timely communication and highlight team members' achievements to ensure that the team functioned smoothly.

Dedicate time to conduct an after-action review (AAR) to capture and document what worked well and what improvements should be considered for future training.

## BACKGROUND

DDI/EDU is tasked with preparing USAID education staff to more effectively build capacity of education staff, influence policy design, and support systems in partner countries to achieve education goals. The EPIC Professional Development (PD) Team collaborated with subject matter experts (SMEs) and DDI/EDU contacts to design and deliver effective technical training that was relevant to the trends and priorities of the sector, the Agency, and DDI/EDU. This collaborative approach to design ensured that training courses transferred the necessary knowledge, skills, and attitudes to learners, while taking into account adult learning principles and engaging facilitation techniques.

EPIC initially focused on designing in-person training, but the emergence of the COVID-19 pandemic prompted a shift in focus to online learning modules and virtual instructor-led training for courses such as the Effective Education Portfolio Management (EPPM) Course and Education Overview Course. This shift necessitated consistent virtual planning meetings, up-to-date trackers and organizational tools, and piloting virtual modalities for formerly in-person training opportunities.

## GOOD PRACTICE

### DEFINE ROLES AND RESPONSIBILITIES

Clear roles and responsibilities are essential to working effectively on a design team. Over the life of the project, EPIC worked with USAID to configure ideal teams to effectively carry out tasks. The design team should consist of:

- A **project coordinator** who serves as the primary point of contact responsible for communicating updates and action items to the team, maintaining a knowledge management process, overseeing trackers and timelines, and facilitating design meetings.
- An **instructional designer** who is well-versed in adult learning and is responsible for designing the sessions.
- A **facilitator** responsible for facilitating activities and transitioning between modules during each session. In some cases, the adult learning specialist may act as the facilitator.
- A **project associate** (in-person) or producer (online) responsible for supporting the smooth delivery and implementation of the training.
- **USAID SME(s)** responsible for providing up-to-date content and Agency-wide context to inform technical training, support module and session design, and in some cases facilitate training sessions.
- The **USAID point of contact** (POC), typically the activity manager, who will oversee the design and implementation of the training and be the primary liaison with the contractor.

The responsibilities of each design team member should be clearly defined as early as possible. In particular, the design team should create clear and structured processes for how each team member is expected to contribute to decision-making on key design elements such as agendas, sequence, and learning activities. Rather than requesting general input and feedback from SMEs and/or the DDI/EDU contact through an email or meeting, create a streamlined process that clearly outlines where, when, and how each relevant team member should offer their contributions to activity design. The RACI (Responsible, Accountable, Consulted, Informed) approach is a helpful framework to list people involved in each stage and level of responsibility.

### TRACK PROGRESS

In preparation for training design and delivery, EPIC worked with the design team to create a realistic timeline and trackers for each training component to then be populated by each responsible party. The timeline is essential to tracking the team's progress. Before the planning process commences, it is important to list key milestones, set appropriate time frames, and discuss the timeline as a team. This is an opportunity to get a sense of who will take the lead on tasks, determine bandwidth among team members, and provide confirmation on key dates and deliverables.

The project coordinator was tasked with communicating and updating the team on a consistent basis through email updates and periodic meetings. Weekly email updates from the project coordinator should include a progress check, next steps, and action items, including links to timelines and trackers for updates. The project coordinator should schedule design and planning meetings periodically, with a clear agenda and facilitator. Due to scheduling issues, it may be necessary to provide asynchronous channels for the design team to provide inputs to content areas and session designs in addition to regularly scheduled planning meetings.

During training delivery, the design team should continue to meet and discuss how the sessions and modules can best respond to participant needs in real time. A successful approach has been to hold daily debriefs after

each training session to glean lessons learned and prepare for the next day of training. This requires a flexible, adaptive, and iterative approach that responds to emergent concerns throughout the training delivery.

### ESTABLISH A KNOWLEDGE MANAGEMENT PROCESS

EPIC successfully streamlined a knowledge management process so that all team members were able to easily access and develop relevant planning documents. This was done by creating a central location (i.e., Google drive) to house all documents, resources, and links. A clear email subject line is also helpful in ensuring ease of communication and quick tracking of correspondence. A facilitator should work closely with a project associate (in-person) or a producer (online), along with SMEs and the course POC, to determine how the session will flow and what is needed for each module and session.

Additionally, EPIC created facilitator guides and process and guidance documents to support design and implementation of future training, workshop, or webinar offerings. A facilitator's guide should include a detailed agenda, logistics on how each activity will run, instructions that will be relayed to learners, and roles relevant to delivering each activity. This guide should be shared with the design team well in advance of the training and be available for comments, suggestions, and collaboration. Lastly, a facilitator guide can serve as a resource to be reused and updated for future iterations of a training, workshop, or webinar.

### ENCOURAGE OPEN, TRANSPARENT, AND TIMELY COMMUNICATION AND HIGHLIGHT TEAM MEMBERS' ACHIEVEMENTS

When developing a training as a design team, EPIC sought to encourage open, transparent communication regarding team members' work style and preferred processes, particularly as it pertains to session and module design and development, in order to mitigate confusion and ambiguity. It is also critical that lead designers provide the team with a detailed facilitator guide and communicate in a consistent and timely manner to ensure trust and confidence among team members. EPIC also prioritized acknowledging and celebrating the achievements of individuals or groups within the design team to foster morale, unity, and successful implementation of training. When members of the team are recognized and appreciated for their contributions, the team will function more smoothly with a greater sense of purpose.

### DEDICATE TIME FOR A DETAILED AFTER-ACTION REVIEW

AARs are a critical opportunity for the design team to reflect on what occurred and what was learned throughout the training design, development, and implementation. In order for an AAR to be effective, team members should feel comfortable sharing constructive feedback and recommendations for improvement. The team should dedicate at least two hours for a facilitated AAR meeting. Questions should target conditions that were specific to the training including modality, content areas, sequence, engagement, facilitation, evaluation methods, and how the team worked together. Below are a few key questions that will be answered as a result of an effective AAR discussion:

- What were key and pivotal moments?
- What was your best moment as an individual? What was the team's best moment? When was the team at their best, and what did it look like?
- What surprised you during the planning and implementation phases? Why was this significant?
- What were the pros and cons of the chosen modality?
- What components of this offering should be replicated, eliminated, and/or adjusted?
- What could have been improved?

## OUTCOMES

The good practices listed above contributed to the smooth functioning of the design teams EPIC supported, which ultimately resulted in the successful design and delivery of more than 40 courses, trainings, webinars, and workshops during the project's five and a half years of support to DDI/EDU. EPIC ensured training aligned with learners' needs, followed a logical sequence, transferred relevant and applicable knowledge, skills, and attitudes to learners, and abided by adult learning principles.

The EPIC PD Team clearly delineated what, when, and how each team member contributed to the training design and then celebrated those contributions. As a result, team members were more responsive and accountable to learners' needs, displayed distributed leadership on key tasks, and delivered a coherent, well-thought out training design. The success of the EPIC PD team is highlighted by the evaluation of the 2020 virtual asynchronous offering of the EOC, in which participants indicated that they felt that the content was informative and relevant, training methods were effective and useful, support materials were of high quality, and information was presented clearly and effectively.

## LESSONS LEARNED

### INSTITUTE AND COMMUNICATE PROCESSES AS EARLY AS POSSIBLE

EPIC found that teams tend to begin training design before building the necessary foundation of shared expectations and understanding between team members. Before any component of the training analysis or design begins, the first priority should be to co-create clear processes, roles and responsibilities, trackers, timelines, and information management system. EPIC learned that had team members set this foundation initially, it would have mitigated confusion and ambiguity later in the design process resulting from busy schedules and varying levels of experience. It is also critical that all team members commit to maintaining agreed upon processes and open lines of communication throughout the implementation of the training.

### ENSURE DESIGN TEAM MEETINGS HAVE COMPREHENSIVE AGENDAS THAT TARGET ACTIONS AT EACH STAGE OF THE TRAINING CYCLE

EPIC scheduled and organized several design team meetings that addressed emergent needs and concerns during training design (i.e. updates in USAID guidance, changes in modality, etc.). However, a more structured approach to organizing meetings would ensure that no essential training components are missed. Design team meetings are an opportunity to not only discuss emergent concerns, but also to address how and who will contribute to each stage of the training, including needs assessment, needs analysis, training design, monitoring and evaluation, implementation, and follow-up. Future design teams should ensure that the project coordinator understands their role in developing, organizing, and sharing meeting agendas, as well as facilitating the meeting if necessary. One recommendation is that design team meetings be added to the master timeline with broad agenda items that target each stage of the training cycle.

*This brief was created by Education Performance Improvement, Communications, and Knowledge (EPIC), a five-year activity (2015-2021) of support services to the Center of Education (DDI/EDU). EPIC consisted of activities in four key areas that were implemented simultaneously: performance improvement through organizational effectiveness; professional development, training, and learning for all staff; knowledge management, generation, brokering, uptake, and use; and internal and external communications, engagement, and partnerships.*