How To

A Guide for Recruitment in Virtual Training

JengaLab TechChange DEVELOPMENT GATEWAY An IREX Venture

A GUIDE FOR RECRUITMENT IN VIRTUAL TRAINING

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INTRODUCTION AND BACKGROUND

ABOUT THIS GUIDE

Purpose

This document is to help guide instructional designers to define, identify, recruit, and select individuals within target populations and communities to participate in virtual training. It is recommended that the steps outlined in this document are followed closely. However, adaptations can be made based on the needs of the training and the characteristics of involved stakeholders and training participants.

Instructional designers should refer to this document to:

1. Optimize workflow and the successful execution of virtual trainings
2. Identify the appropriate target audience and select the appropriate individual(s) to participate in the developed virtual training
3. Ensure that the delivery of the virtual training is best aligned with the needs, strengths, learning preferences, and capabilities of the selected training participant(s)

Audience

This guide is intended for use by instructional designers when identifying and recruiting the right participant profile for virtual training.

KEY TERMINOLOGY

- **Instructional Designers:** An individual who designs, develops, and delivers instructional content. The term instructional designer is used throughout this document to define different types of people who design and develop trainings.
- **Training:** An opportunity in which participants have a tailored experience to a single or series of synchronous, asynchronous, or blended learning opportunities with one set of defined objectives and multiple outcomes. Virtual training may be designed as one or more courses (a single modular learning experience) or programs (a series of modular learning experiences), but each design will have different completion requirements and learning outcomes. A training (e.g., course or program) certificate is typically awarded.
- **Asynchronous:** Learning is accessed and completed on a participant's own schedule, within a certain timeframe. Participants can access and complete any and all learning materials at any time during the time at which the training is accessible and open for learning.
- **Synchronous:** Learning is achieved by which the participant and instructor(s) are in the same place, at the same time, in order for learning to take place. This may include collaborative live virtual meetings and activity groups
- **Blended:** Learning that combines virtual training materials that can be retrieved independently online paired with opportunities for live interaction and collaboration with other participants, trainers, and instructors; a hybrid approach to asynchronous and synchronous learning.

- **Individual:** A single or separate human identified as a potential training candidate, usually found within the target audience and is an end user.
- **Target Audience:** A particular group of individuals that the virtual training is designed for and content is marketed to.
- **End User:** The individual who uses a particular product or the marketed content (e.g., virtual learning platform), usually found within the target audience.
- **Participant:** An individual who takes part in the virtual training, identified as an end user from the target audience.
- **Primary Audience:** Participant(s) who represent, lead, manage, or have direct roles and responsibilities within the areas that the virtual training is related to and which the objectives and outcomes of the training promote.
- **Secondary Audience:** Participants who are tangential to the roles, responsibilities, or interests of the training field(s) and learning objectives.
- **Ideation Session/Workshop:** Process to generate ideas and solutions through brainstorming and design thinking.
- **User Persona:** A semi-fictional character based on the ideal virtual training participant.
- **Orientation/Informational Session:** A live event that allows instructional designers and stakeholders to meet with individuals who are interested in becoming participants in the virtual training in an informal setting.
- **Training Launch:** The official start date of the training, in which all training resources and materials become available to enrolled participants.
- **Training Kickoff:** The official start of the blended or synchronous training.

MINIMUM PARTICIPANT REQUIREMENTS FOR VIRTUAL TRAINING

Virtual Access and Digital Literacy

Access to a computer, laptop, tablet, or mobile device that can connect to the internet is required. Additionally, participants must possess baseline digital literacy and have the confidence to independently navigate virtual learning platforms, content, resources, and materials. Use the descriptions below to help gauge participant knowledge and capabilities. Each of the following criteria may be determined through an audience needs assessment or questionnaire. This is detailed in subsequent sections below.

- **Digital Literacy**
  - *Low* – Does not regularly use digital tools and virtual platforms. Requires high-level support and guidance when navigating digital technologies, devices, software, and systems. Likely communicates and receives information through mobile devices (e.g., mobile phones or tablets), but does not regularly use computers or laptops. Has no or very limited working responsibilities with or access to digital tools and resources.
  - *Medium* – Can communicate and receive information through digital tools and virtual platforms. May require support and guidance when navigating digital technologies, devices, software, and systems, but mostly self-sufficient. Likely communicates and receives information across a variety of digital devices. Has limited working responsibilities with or access to digital tools and resources.

- *High* – Regularly uses digital tools and virtual platforms. Able to independently find, evaluate, communicate, and receive information through a variety of digital devices. Works regularly with digital technologies, devices, software, and systems.

- **Access to Technologies**
    - *Low* – Occasional access to a mobile device or computer/laptop; challenges accessing tablets or other digital devices.
    - *Medium* – Access to mobile and computers/laptops is strong; occasional access to tablets or other digital devices.
    - *High* – Access to mobile and computers/laptops is guaranteed; frequent access to tablets or other digital devices.

- **Bandwidth**
    - *Low* – Predominantly working within communities and away from computers or laptops. May have some mobile or tablet connectivity, but reception is likely poor.
    - *Medium* – Has access to internet connection across mobile and tablet devices. May have access to a computer or laptop with decent, semi-reliable connectivity, but experiences power surges and interruptions in connection that require the need to frequently rejoin a webpage or virtual meeting.
    - *High* – Access to reliable internet connection across mobile and tablet devices. Has access to multiple technologies at one time with a strong or reliable internet connection.

Baseline Knowledge for Key Training Concepts and Topics

Participants should have a baseline knowledge of the topics and concepts introduced and discussed in the designed training. For example, if the training is designed to leverage applied practices for planning national agriculture systems, then participants should have professional or educational experience in national policy work, government, agri tech, or extension services, and recruitment for training participants should focus on end users within target audiences of individuals who are working in ministries of agriculture or land use and universities or colleges of public policy and agriculture.

Ideally, all participants will begin the training with the same or closely related baseline skills, abilities, and understandings. A needs assessment should be created to identify the strengths and challenges of training participants that will gauge both participants' abilities to work virtually and their existing background on the training topic. This will help scope the baseline knowledge across participants before the start of the training. From this needs assessment, the selection of the "ideal" participant can begin to further ensure all are beginning "equal." These processes are detailed in the subsequent sections below.

RECRUITING FOR YOUR TRAINING

1. DETERMINE THE TARGET AUDIENCE

Instructional designers and stakeholders should have a general idea of the target audience and the type of end users within that audience eight weeks prior to the official launch and kickoff of the training or one week following the training ideation session(s) or workshop(s) to allow enough time to plan and scope all elements for successful training recruitment and have high participant engagement.

The first step is to host one or more ideation sessions or workshops that include a User Persona activity. The goal of a User Persona activity is to identify the expected end user who will be engaging with the training platform and applying the tangible outcomes of the training. **The User Persona should emphasize the end user's environment, motivations, goals, and challenges.** Include stakeholders and end users from the target audience during the ideation session(s) or workshop(s) to ensure holistic inclusion, accuracy, and alignment with the true vision of the virtual training.

A **User Persona** is a fictitious character designed using key knowledge, inputs, and ideas that instructional designers and stakeholders have about the ideal end user for the training. Key features to include in a User Persona include a user headshot, motivations, professional demographics, strengths and weaknesses, desired outcomes, a short bio, and a brief insight into the user's personal life (e.g., marriage status, children, residence, etc.). An example of a User Persona used for training development is referenced in **Appendix A**. Please note that User Personas will differ visually and in content depending on their use case. There is no "right" or "one" User Persona.

2. PLAN THE RECRUITMENT TIMELINE

The User Persona(s) will help inform the training timeline and determine how, where, and when the training will be communicated and advertised across target audiences and to end users (e.g., email announcements, social media sites, etc.). **Begin planning the training recruitment timeline immediately following the identification of the target audience and end user(s) for the desired training decided at the time of the User Persona activity.** Announcement dates for the recruitment timeline, official training period (i.e., the dates that the training will start and end), and the enrollment period (i.e., the dates when participants can enroll for the training) must be determined at least eight weeks prior to the official training launch and training kickoff.

To mitigate confusion and streamline communication, registration, and enrollment, planning for the recruitment timeline should be completed before any information is shared with target audiences and end users. A recommended training recruitment timeline example is shared below.

COMPONENT	TIMELINE (MINIMUM TIME PRIOR TO OFFICIAL TRAINING LAUNCH OR KICKOFF)
Training announcement(s) ● Training announcement should include: ○ determined target audience ○ determined recruitment timeline ○ commitments and expectations ○ participant incentives (optional)	At least 8 weeks prior
Preperation of the recruitment package ● Following the preparation of the recruitment package, the recruitment package should be shared publicly at least 5 weeks prior to the official training launch or kickoff.	At least 6 weeks prior
Notification of participant nomination ● Notification of participant nomination should include: ○ an info sheet of the high-level overview and objectives of the course ○ schedule ○ commitment and expectations	At least 4 weeks prior
Participant Needs Assessment sent	At least 4 weeks prior
Notification of training orientation	At least 3 weeks prior
Primary, secondary, enrolled, and waitlisted participants identified ● Waitlisted participants should be notified ASAP upon training spots opening.	At least 3 weeks prior
Notification of training launch	At least 2 weeks prior
Training orientation/informational session	At least 2 weeks prior
Participant documents sent ● Including: ○ training commitment letter ○ platform registration ○ enrollment instructions	At least 3 weeks prior
Participant documents returned ● Including: ○ completed needs assessment ○ signed commitment letter	At least 1 week prior

○ completed platform registration	
Hosting of training kickoff	At least 1 week prior, with a reminder 3 days prior
Q&A training webinar (optional) ● When planning the timeline, it may be helpful to schedule optional office hours following the training. Synchronous Q&A sessions give potential training participants the opportunity to learn more about the training and expectations and ask questions. Additional office hours following the training launch or kickoff may be scheduled depending on the project's needs.	Within the first 2 weeks after the training kickoff

3A. ESTABLISH TRAINING COMMITMENTS AND EXPECTATIONS

Training commitments and expectations should be determined at least **eight weeks** prior to the official training launch and kickoff.

Defining the commitments and expectations of the training before communicating them with the target audience(s) and end user(s) is required for the success of the training. Considerations when outlining training rules, regulations, and guidelines may include but are not limited to:

- Time commitment/dates/topics/and duration of training content, sessions, or deliveries.
    - Internal decisions, including the capacity to deliver the training (e.g.,. Facilitators and content experts will be vital in leveraging the learnings of the training and should be determined and solidified early. This information is optional to share with audience members, but may help with recruitment depending on who the facilitators or content experts are and how much influence or expertise they hold in the training content topic(s)).
- Training structure (i.e., asynchronous, synchronous, or blended) and modality (e.g., virtual, in-person, hybrid).
    - Commitment and expectations for participants and attendance to pre-training deliveries such as onboarding, information sessions, or office hours should be determined and shared with the audience in the commitment letter. This is detailed in subsequent sections below.
- Commitments to travel, travel logistics, and travel expectations (as needed).
- Project activities (e.g., capstone/final project).
- Participation (e.g., team-based learning, attendance to live sessions, completion of quizzes).
- Time-/attendance-tracking.

3B. DEFINE PARTICIPATION INCENTIVES (OPTIONAL)

The decision to include training incentives must be made early to ensure adequate allocation of resources and funding. Official determination on incentives should be finalized **eight weeks** prior to the official training launch and kickoff. The exact timeline for incentives will depend on when and what incentives participants will receive.

Incentives leveraged to optimize audience participation and completion might include but are not limited to:

- **Training points** are incentives that participants can earn as they progress through the training materials. Subsequently, they can be awarded a training "prize" based on the accumulated points. Instructional designers can be tasked with the naming of these training points to also increase participant engagement and incentive (e.g., "TechPoint").
    - Internal decisions on how many training points are earned equate to what prize(s) must be determined before the platform or training mode of delivery is publicly shared with the audience. Training points may also influence certificate and training completion requirements.
- **Strategic delivery hours** that correspond to regular working/business hours. This works best when partnering with organizations that allow participants to complete/engage in training materials during their work day.

4A. PREPARE THE RECRUITMENT PACKAGE

Include orientation or informational session(s) dates, open enrollment dates, training objectives, and a brief summary of the training in the public announcement. Instructional designers and key stakeholders should be involved and give clearance before any information regarding the intended training is released publicly. Recruitment resources and materials should be planned and prepared **six weeks** prior to the training launch and kickoff.

In addition to scoping and refining the recruitment timeline, prepare resources and materials that will support the strategic communication about the training to target audiences and end users. These resources and materials should include enrollment dates for the training, participant eligibility, training modality, objectives, a summary of the training, and participant expectations. When preparing these resources and materials, consider how they should be shared and advertised (i.e., email announcements, social media sites, etc.). The recruitment package should include but is not limited to:

- A virtual flyer, brochure, or PDF agenda that can be shared as attachments in outgoing emails or across social media platforms that support the social media campaign
- Static images, gifs, LinkedIn posts, Facebook posts, etc.

All resources and materials included in the recruitment package should clearly articulate:

- Target audience(s) and end user(s)
- Commitment expectations such as:
    - Internet connectivity requirements for success
    - Digital literacy requirements
    - Expected levels of participation (time commitment, completion criteria, etc.)
- Value adds or benefits of the training (e.g., a list of core learning objectives or takeaways)
- Training timeline(s) or dates
- Language of facilitation and supporting informational materials, and expected uses of virtual tools
- Language or text translation or interpretation needs
- Past participant testimonials

One of the biggest challenges at this step is pulling in the right participants, especially with regard to time and commitment. Often, it can be difficult to decide on exact dates/times early in the recruitment process, but this will help to ensure recruited participants are actually able to attend the training during the session times and for the full duration.

Another key challenge in this step that should be considered and thoughtfully assessed is identifying the language(s) in which the training or any related communications will be hosted or shared before informing target audiences, end users, and participants. The language(s) of the training can be considered when designing the User Persona. Although language should be considered, it is most important to recognize that the training may only be available in one language; thus, instead of changing the language of recruitment materials and training delivery, instructional designers and stakeholders may need to tailor recruitment to target audiences, end users, and prospective participants who have fluency in the original language that the virtual training was designed in.

Additionally, if past participant testimonials are unavailable (e.g., it is the launch of a pilot or inaugural training), subject matter experts in the training topic, stakeholders, or audience champions could provide statements that support buy-in from the target audience. By outlining the above in all recruitment resources and materials shared across target audiences, instructional designers will be able to mitigate any risks or challenges during participant recruitment.

4B. SHARE THE RECRUITMENT PACKAGE; OPEN ENROLLMENT

Once the target audience(s) and end user(s), timeline, resources, and materials have been solidified, the training announcement with related information can be shared publicly. Recruitment resources and materials should be shared publicly at least **five weeks** prior to the training launch and kickoff.

During this time, efforts should be centered around communicating and marketing the training to the target audience(s) and end user(s). Referring back to the designed User Persona is key to ensuring all recruitment resources and materials reach the right audience and in the correct context.

When sharing virtual recruitment packages, instructional designers should collaborate with stakeholders and consider training needs that will influence how and where recruitment packages and related information are shared across target audiences, end users, and prospective participants. Platforms to share recruitment packages include but are not limited to,

- LinkedIn
- Facebook

- Instagram
- WhatsApp (via curated community channels)
- Email
- Word of mouth

Recruitment packages should be shared in the language that the course or training will be presented in, which should be reflective of a common language spoken by the prospective participants. This is because if the advertisements are in a spoken language that is different from the language of the training, there is a risk of recruiting people who may not speak the language that the training will actually be delivered. Additionally, each recruitment package and recruitment materials (e.g., images, gifs, posts) should be tailored to the cultural contexts of the target audience, end user(s), and prospective participants. This can be done by creating images and gifs with characters that share similar characteristics to those in the target audiences and languages.

4C. HOST AN ORIENTATION/INFORMATIONAL SESSION (OPTIONAL)

Consider hosting an orientation or information session for interested individuals from the target audience(s) to learn about the upcoming training. The orientation or informational session should not last longer than **90 minutes** and should be held no later than **two weeks** prior to the training launch and training kickoff.

During this session, consider having key stakeholders, instructional designers, or training alumni speak about the upcoming training and share their experiences. During the orientation or informational session, prospective participants should get the opportunity to learn as much information and ask questions about the training as possible. This is an opportunity for them to connect with the training developers, subject matter experts (SMEs), and any additional training or developer staff who will have key knowledge about the format, structure, modality, or contents of the training.

The orientation or informational session should share all information that has already been shared in the recruitment package, such as the duration and commitment expectations of the training, the objectives and outcomes of the virtual training, post orientation or informational session next steps, and where and how to register for the virtual learning platform and enroll in the training via the virtual learning platform. A sample itinerary of a typical training orientation or informational session is detailed in **Appendix B**.

5. SCOPE THE TRAINING SIZE AND SUPPORT STAFF

Have a general sense of the training size and the support required to successfully deliver the training. This will likely depend on the available budget and training delivery modality or location. Training size and support staff should be finalized at least **five weeks** prior to the training launch and kickoff.

The size of the training will impact both the participant experience and the support needed to ensure the successful delivery of and experience with the training. After determining the target audience(s), end user(s), and how training information will be shared within these target audiences, determine the training size.

The size of the training and support required will likely depend on the budget and scope of the project; however, it is recommended to consider the following:

Total Participants per Live Training Delivery. The total size of a training may vary depending on available funding, scope, and the desired reach of the training. Training sizes can range from 18 to 250, but there is no right or wrong number. Instead, this number will vary depending on the training objective, outcomes, modality, and desired participant experience. The initial number of recruited participants can be larger than the number of slots available. In most cases, it is helpful to create a waitlist to replace individuals who might drop out of the training shortly before or after the initial launch and kickoff.

In synchronous trainings, it is recommended that each live session have a maximum of 50 participants, in order to ensure group sizes are small enough for participants to fully engage with the activities and interact with facilitators. This helps to optimize the participant experience by allowing facilitators and content experts to successfully manage both the training and participant needs during the live session. If a training has more than 50 participants registered, it is recommended to divide the participants into groups and host more than one synchronous live session per week (e.g., Group A and B, with sessions on Thursdays and Fridays, respectively). In this case, it is useful to add a question to the needs assessment for participants to denote their preferred date/time of the week. It may not always be possible to guarantee everyone's preferred group, but this will also help with participant retention.

Another strategy to boost participant engagement is to include discussion or activity-based breakout sessions during the training. In these breakout rooms, it is important to limit the number of participants. Ideally, breakout rooms should have five to seven participants per room, with a cap of eight participants per room, and there should be one facilitator assigned to monitor each breakout room. Thus, the size and number of breakout rooms and the number of facilitators are dependent on one another and may determine what size of training your project can support. The content expert or presenter in the live session should not be included in the count of facilitators supporting breakout rooms and can instead act as a “floater” or “jumper” and navigate between breakout rooms to hear participant conversations and provide technical expertise or answer any questions that may arise during the activity. This will also grant them a break between presentations.

Throughout the duration of the virtual training live session, there will likely be a drop-off of participants, so you may overestimate the training size or accepted number of participants admitted for the live session delivery. If a participant leaves the virtual training live session, don’t panic—just make sure to admit them when they rejoin. This also applies if a participant leaves during a breakout room activity. In this scenario, be sure to readmit the participants to the virtual training and assign them back to the breakout room they were originally in so that they may continue engaging with the group.

Support Staff, Content Expert, and Facilitation Support. Support, content experts, and facilitation support staff must be comfortable working in virtual spaces (such as Zoom, WebEx, Teams, etc.), managing participant breakout rooms, and leveraging discussions during activities. Support and facilitation staff are required to attend the entirety of the session delivery, while content experts may join only the session in which they are presenting. The ideal support and facilitation staff-to-training size ratio is shared below:

- Fewer than 25 participants people = 2 facilitators
- 26 to 29 = 3 facilitators
- 30 to 50 = 4 to 5 facilitators

Available support and facilitation staff will be determined by the available project budget. Creating a tracking spreadsheet to record all key project personnel and stakeholders can be used to help organize the development and delivery of the training. Information including name, surname, email, organization, region/location, time zone(s), and role(s) (e.g., Zoom, WebEx, Teams, etc., and platform permissions) should be identified in the tracking spreadsheet. It is recommended to budget for additional support and facilitation staff during live delivery.

6. IDENTIFY THE "IDEAL PARTICIPANT" THROUGH A NEEDS ASSESSMENT

Identify who within the target audience and which end users will be the best candidates to participate in the upcoming virtual training. The ideal participant should be identified at least **four weeks** prior to the training launch and kickoff. A needs assessment is usually sent immediately with, during, or following the official release of the recruitment package and orientation or informational session(s).

Step 1: Identify Ideal Participants

A needs assessment should be created to identify the strengths and challenges of the target audience and the end users within it. When developing a needs assessment, make sure you capture the following from respondents:

- First/surname
- State of residence
- Agency/professional affiliation
- Job/role title
- Age
- Gender identity
- Collective motivation(s)
- Competing priorities

- Preferred meeting time
  - Low – Does not regularly use digital tools. Requires high-level support and guidance when navigating digital technologies. Can likely communicate and receive information through mobile devices.
  - Medium – Can communicate and receive information through digital tools. May require support and guidance, but mostly self-sufficient when navigating digital technologies. Has limited working responsibilities with or access to digital resources.
  - High – Able to independently find, evaluate, and communicate and receive information through digital tools and platforms. Works regularly with digital tools and technologies.
- Access to Technologies
  - Low – Occasional access to a mobile device; challenges accessing a computer or laptop.
  - Medium – Mobile device guaranteed; occasional access to computer or laptop.
  - High – Frequent access to a computer or laptop; Mobile device guaranteed.
- Bandwidth
  - Low – Predominantly working within communities and away from computers or laptops with internet connection. May have some mobile connectivity but reception is likely poor.

- Medium – Has access to mobile devices with a reliable connection. May have access to a computer or laptop with decent, semi-reliable connectivity. May experience power surges and interruptions in connection that require the need to frequently rejoin a webpage or virtual meeting.

- High – Access to reliable internet connection and technologies is strong. Navigating on and with computers, laptops, or mobile devices is not a challenge. May have access to multiple technologies or computer screens.

- Preferred communication (e.g., email and WhatsApp)

Examples of sample questions to include in a needs assessment are shared in **Appendix C**. Additional questions may be added based on the needs of the training or desired participant metrics.

Step 2: Align the Audience to the Project Scope

As prospective participants complete and return their needs assessment, instructional designers and stakeholders should make sure that their responses are aligned with the goals, objectives, and engagement requirements, as well as reflective of the User Persona(s) of the course. Use the flowchart below to ensure alignment.

- Do prospective participant responses to the needs assessment align with the originally developed User Persona? (Likely completed during the ideation session or initial project scoping phase)
  - Yes = Can move forward with recruitment.
  - No = STOP. Must revisit the training User Persona and review the training objectives, outcomes, and expectations. At all times, the objectives and outcomes of the virtual training must align with those selected to participate in the virtual training to ensure accessibility and success. The User Persona must be the single source of truth when constructing the virtual training and identifying ideal participants.

- Do participant motivations align with the scope/topic of the project?
  - Yes = Can move forward with recruitment.
  - No = STOP. Participant motivations must align with the scope of the project. This may require revisiting the User Persona. Will likely impact participation/completion rates if otherwise.

- Digital literacy
  - Low – Can move forward with recruitment but may require revisiting the User Persona as some participants may experience increased challenges when interacting with the virtual training. Considerations around increased orientations or office hours should be applied. Will likely impact participation/completion rates if otherwise.
  - Medium – Can move forward with recruitment. Considerations around increased orientations or office hours should be applied. May impact participation/completion rates if otherwise.
  - High – Can move forward with recruitment.

- Access to technologies
  - Low – STOP. Require revisiting the User Persona as participants may not have the necessary digital tools required to complete the virtual training. This will likely impact participation/completion rates if otherwise. Considerations around changing the training modality to a training of trainers (ToT) or fully synchronous in-person training models should be applied as this will reduce the need to rely solely on digital tools.
  - Medium – Can move forward with recruitment. This may require revisiting User Persona as noted in the above bullet with consideration to develop and design activities that are synchronously focused. May impact participation/completion rates if otherwise.
  - High – Can move forward with recruitment.

- Bandwidthdwidth
  - Low – STOP. Requires revisiting the User Persona as participants selected may not have the available internet connection needed to complete or be successful during the training. This will likely impact participation/completion rates if otherwise. If participants have indicated they have low bandwidth, considerations around changing the modality of the training, such as ToT or synchronous models, should be applied.
  - Medium – Can move forward with recruitment. This may require revisiting the contract and scope of work or moving forward with the project development with consideration to developing and designing activities that are synchronous or focused. This will likely impact participation and completion rates if otherwise.
  - High – Can move forward with recruitment.

- Preferred communication
  - Email
  - WhatsApp
    - Scoping country/region communication leads/personnel should be considered.

Step 3: Create Primary vs. Secondary Audience Groups

It may be helpful to identify primary and secondary audience groups when considering who to prioritize for enrollment in the training. These groups should be determined at least **three weeks** before the training launch date, at the same time that other individuals are selected to participate in the training.

Individuals selected as “primary” participants are those who best align with the goals, objectives, and expectations of the virtual training and meet all of the criteria outlined above. Additional requirements may be included, determined by the instructional designer(s) or involved stakeholder(s). These additional requirements may include but are not limited to the individual’s professional organization or affiliation and professional role or responsibility. These audience requirements will likely be included when communicating to large audiences across varying backgrounds, though the designation between primary and secondary groups should not be disclosed explicitly. Primary participants will likely be those first selected and notified to engage in the virtual training. Secondary audiences may be individuals who meet all of the items outlined above but do not have professional roles or responsibilities that are outlined for the primary audiences.

After the ideal participants have been identified, a participant roster should be created that includes the participant's name, surname, email, organization, and region/location. Additional participant contact information (e.g., mobile numbers, mobile carriers, professional role(s), spoken language(s), team assignments, and time zone(s)) can be included based on the needs of the project and preferred communication or tracking preferences.
Reminder: The quality of the audience is more important than quantity to ensure high participation, completion, and retention rates!

Step 4: Create an Audience Waitlist and Replacement Plan

Waitlist audiences are typically individuals from the secondary audience group, individuals who do not meet primary or secondary audience requirements but are still good candidates for the virtual training, or individuals who show interest in participating in the training late. They should be determined at least **two weeks** before the official launch and kickoff of the training.

An audience waitlist should be developed if the number of training slots for primary and secondary audience groups reaches capacity and there is a larger number of secondary audience individuals, individuals who do not meet primary or secondary audience group requirements but are still good candidates for the training, or individuals who inquire about participating in the training late. Refer back to "**Step 3: Create Primary vs. Secondary Audience Groups**" when defining the primary vs. secondary audience groups for the training. After the creation of a waitlist, a replacement plan should be established to identify individuals on the waitlist to replace open/dropped slots.

A good way to determine individuals who should and should not be assigned to the waitlist is by aligning the individual's background with the defined "primary" vs. "secondary" audience roles. In this example, individuals who meet the defined "primary" audience roles will be selected to have a confirmed training slot, while those deemed as "secondary" will join the waitlist. Should a "primary" individual with a confirmed training slot be removed, an individual from the secondary audience group placed on the waitlist can replace them. Another example may involve prioritizing individuals who return their commitment letter first by giving them a confirmed slot in the training, while placing those who return their commitment letter late on the waitlist, still prioritizing "primary" audiences on the waitlist for a slot in the training. In this example, all prospective participants who submit their commitment letter early will have a confirmed training slot on a "first come, first serve" basis, while those who submit their training letter late will be placed on the waitlist and be given a training slot only if one becomes available, still prioritizing individuals who are determined as "primary" audience.

It is best to replace participants who drop from the training with waitlisted individuals as soon as possible after receiving confirmation that someone will no longer participate in the training. No participant from the waitlist should be added to the training two weeks after the training launch and kickoff have been delivered. This date for final training additions should be determined by instructional designers and will vary depending on the length, content, and actions required and assigned to participants at the beginning of the training. Regardless of when waitlisted individuals are added to the training, they should be expected to complete catch-up work for any training content that they missed.

7. SEND TRAINING COMMITMENT LETTER

The target audience should receive the training commitment letter and understand the expectations and requirements of the training at least **three weeks** before the official launch of the training kickoff. Signed commitment letters should be *returned* no later than **one week** before the official launch of the training kickoff.

The commitment letter should be sent to audience members who have completed the needs assessment and have been selected to participate in the training. An example commitment letter is shared in **Appendix D**.

APPENDIX A

PART 1

User Persona	National Vaccination Immunizations Officer (NIVO) (Health System Manager)

Instructions

In your groups, after reading through Lucy's National Vaccination Immunization Officer (NIVO) user persona (on the right):

1. Create Lucy's personal motto.

2. Identify three potential challenges for her role.

3. Move the circle along the spectrums to tell us about Lucy's personality and potential influence in Onesa's health system.

Name: Lucy

Motto

Saving lives through immunization!

Age: 34
Job: National Immunization Vaccine Officer
Organization: Ministry of Health
Location: Onesa
Family: Mother of 3 kids, with husband

Roles & Responsibilities

- NIVO for Onesa
- Supervises district health facilities
- Manages national immunization campaign programs in coordination with the Ministry of Health (MOH)
- Regularly visits health facilities
- Receives district reports
- Reviews quality issues, stock-replenishment needs, and technical challenges reported at the district level

Connectivity & Digital Experience

- Government issued computer and personal laptop
- Lacks consistent internet connection
- Manages stock with Excel workbook

Influence on the health system

Low Power/Control 1 2 3 4 **High Power/Control**

Personality

Analytical 1 2 3 4 **Creative**

Challenges

1. Consistent internet connectivity (challenges with data reliability)

2. Manages stock with Excel (challenges with data reliability, efficiency)
- lack of interoperability with excel data, aggregate data difficult to synch/manage
- no real-time visibility across districts, slow to make decisions

3. Privacy concerns with the use of a personal laptop

4. Balancing family life (may need more information about how she manages her time)

Motivations

- Seeing youth thrive and not succumbing to preventable diseases
- Mentoring district immunization vaccination officers (DIVO)

APPENDIX B

[Insert Training Logo Here]

[Enter Orientation or Informational Session Here]: [Enter Title of the Virtual Training Here]

[Enter Title of Virtual Training Program Here] Run of Show (RoS)

[Enter location here]. | [Enter virtual training delivery software here (e.g., WebEx, Teams, Zoom)] | [Enter training delivery time and time zone here] | [Enter training date here]

Resources

Virtual Learning Platform Link:

Backchannel:

Course Materials and Session Recording:

WebEx/Teams/Zoom/etc. Meeting Link:

Notes Document:

Attendance:

Facilitator Responsibilities

Facilitator 1: Delivering Instructions/Speaking	Facilitator 2: Tech Backstop	Facilitator 3+: Support
Delivering instructions	Helping participants with tech difficulties	Helping participants with tech difficulties
Introducing Miro board and larger lift activities	Screensharing the deck, advancing slides	Taking attendance at the start of each session
Tracking and managing Review of Scope (RoS)	Breakout room creation and assignments	Taking notes during the session for key takeaways for follow on assets and asynch course requirements
Interrupting presentation when they start to go over (leeway is 2 minutes over)	Sending time reminders to presenters; relevant links	Grabbing questions (and answers if available) from the chat and copying to the run of show (and later to the discussion thread) **to indicate which were answered (and record answers if possible)*
Making decisions about adjusting time based on reminders	Hitting record, pausing at breaks and breakout rooms	Noting when a session actually ends as opposed to expected end time

Live Delivery Norms

- Use your camera to show that you are present and engaged. Try to keep your camera on as much as possible, if you're able and comfortable.
- Embrace the craziness in your background. Things happen!
- Get up and take breaks as you need them.
- Use the hand-raise function to indicate when you'd like to speak or share questions/comments in the chat.
- Keep yourself on mute unless you're speaking.
- Keep your view in Gallery Mode when in small groups.
- Make sure your name in the video conferencing platform is your actual name.
- Have the TechChange Platform open along with this video conferencing platform.
- Internet connectivity issues happen—we understand. Rejoin when you can; we'll be using the same Zoom link all day.
- Activities are open to interpretation—we want to hear about your experiences and even give you another opportunity to ask us questions when sharing back out in plenary. (No "right or wrong" answers, in some cases).

[Enter Training Date Orientation/Information Session Here]: [(Enter the duration of training minutes here)]

Training Schedule

Session Name	Estimated Time	Actual Time	Detailed Activity & Facilitation	Technologies/Materials
Facilitator Check-in (45 min)			-Plenary; Gallery **[Facilitator 1]** -Reviews RoS w/leadership and facilitation team	**[Facilitator 1]** Opens Virtual Meeting Room; Time/RoS tracking
Tech Testing (5 min)			-Plenary; Gallery -Start music! **[Facilitator 1]** - Welcome participants and allow them to join the meeting. Provide tech support as needed Housekeeping: -These sessions will be recorded to share with colleagues who couldn't join -Please update your Zoom name so that we can track your attendance or list the names of individuals whom you are tuning in with as a group via one device -Cameras on when in breakouts when possible; mics on only when speaking -Participants will be asked to share their name, professional role, and location in the chat	**[Facilitator 1]** Time/RoS tracking; Sends reminder email to participants: ***The X virtual training is starting now! Join now using the X meeting link below.*** ***Join XMeeting*** **[Facilitator 2]** Sends introduction prompt in the chat: ***Welcome! Please share where you're tuning in from today and your professional org./role!*** Screen shares platform landing page **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants; Send a message to participants in the waiting room: ***Welcome! Thanks for joining us. We will open the room in X minutes!*** Send reminder in the chat: ***Reminder*** ***-Make sure that your virtual name matches your actual name so that you may be awarded attendance points*** ***-If you are signing on as a group, please share/list all names in the chat so that everyone can get attendance points*** ***-Keep yourself muted unless speaking***

				-Keep your camera on when/if possible ***-This session is being recorded*** **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants
Welcome (10 min)			**Start Recording** -Plenary; Gallery -End music! **[Presenter] (10 min)** -[Enter instructions/facilitation notes here]	**[Facilitator 1]** Time/RoS tracking; Attendance tracking; RoS note taking; Mute participants **[Facilitator 2]** **Start Recording**; Attendance tracking; RoS note taking; Mute participants **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants
Introduction to/Presentation Overview of the Virtual Training (20 min)			-Plenary; Spotlight **[Presenter]** -[Enter instructions/facilitation notes here]	**[Facilitator 1]** Time/RoS tracking; Attendance tracking; RoS note taking; Mute participants **[Facilitator 2]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants
Questions and Answers with Participants (15 min)			-Plenary; Gallery **[Presenter]** -[Enter instructions/facilitation notes here]	**[Facilitator 1]** Time/RoS tracking; Attendance tracking; RoS note taking; Mute participants **[Facilitator 2]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants
Roles, Commitments, and Expectations of the Virtual Training (10 min)			-Plenary; Spotlight **[Presenter]** -[Enter instructions/facilitation notes here]	**[Facilitator 1]** Time/RoS tracking; Attendance tracking; RoS note taking; Mute participants **[Facilitator 2]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants
Platform			-Plenary; Spotlight	**[Facilitator 1]** Time/RoS tracking; Attendance tracking;

Demo of the Virtual Training and Digital Tools (10 min)			**[Presenter]** -[Enter instructions/facilitation notes here]	RoS note taking; Mute participants **[Facilitator 2]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants
Questions and Answers with Participants (15 min)			-Plenary; Gallery **[Presenter]** -[Enter instructions/facilitation notes here]	**[Facilitator 1]** Time/RoS tracking; Attendance tracking; RoS note taking; Mute participants **[Facilitator 2]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants
Closing (5 min)			-Plenary; Gallery **[Presenter]** -[Enter instructions/facilitation notes here] **Group picture!** **Stop Recording**	**[Facilitator 1]** Time/RoS tracking; Attendance tracking; RoS note taking; Mute participants **[Facilitator 2]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 3]** Attendance tracking; RoS note taking; Mute participants **[Facilitator 4]** Attendance tracking; RoS note taking; Mute participants

APPENDIX C

[Enter Title of Training Here]

[Enter Description of Training, including Expected Time to Complete the Needs Assessment and Date that the Needs Assessment is Due Here]

- Email
- First/surname
- State of residence
- Agency/professional affiliation
- Job/role title
- What is your current age/age range?
  - 18-24
  - 25-34
  - 35-49
  - 50-60
  - Over 60
  - Prefer not to answer
- What is your gender identity?
- Have you previously participated in any online or virtual training, courses, or programs?
- During virtual meetings, programs, courses, or training, have you experienced any technical challenges connecting or participating? If yes, please describe the technical challenge(s) below:
- What is your experience working with collaborative online tools (e.g., Zoom, Microsoft Teams, WebEx, Mural, Miro)?
- Which of the following collaborative tools have you used before? (select all that apply)
  - Zoom
  - Teams
  - WebEx
  - Miro
  - Mural
  - Mentimeter
  - None of the above
  - Other
- What devices do you have available to use for this program? (select all that apply)
  - Desktop
  - Laptop
  - Tablet
  - Smartphone
  - Other
- From where will you be connecting for this training, course, or program?
- How is your internet connection from where you will be connecting?
  - Weak - I have trouble staying connected to the internet and often drop calls.
  - Reliable - I have reliable internet, but it is sometimes slow or disconnects often.
  - Great - I experience very little, if any, trouble staying connected to the internet.
- What motivates you to participate in this training?
- What additional activities, training, courses, or programs are you currently engaged with that might prevent or limit your engagement with this training?
- What is your preferred training meeting time of day?
- What is your preferred or best way to contact and communicate? (e.g., email, WhatsApp)

APPENDIX D

[training Logo] [training Logo]

[training Name]
[Title of training]
[training Logo]
Congratulations and welcome to [Title of training]!

You have been selected to participate in [Title of the training]. As part of the [Title of training], you will [training objectives and/or learning outcomes].

[Detail the history of the training]

Before you embark on this learning journey, you must complete the following items outlined below. Please read this document in its entirety. Your signature on page 2 affirms your understanding and commitment to the terms of the [training].

[Outline time/travel/participation commitment and requirements]

[Provide key training information, including but not limited to phases, dates, activities, and estimated commitment times]

[Describe additional training information, including but not limited to virtual participating requirements and the participant or team-based learning activities]

Your Commitment
[Instructional designer/stakeholder name] is committed to delivering a high-caliber learning experience tailored to your context and needs. In return, you are expected to return the same level of commitment and investment. By signing this agreement, you acknowledge and accept the terms of this [training name]. Please return a signed copy of this document to [Receiving party] via [Receiving party contact information] by [Date/year/time].

Name (Printed):__________________

Signature: ______________________ **Date:** ______________________

[Additional information, such as information or links to demographic surveys or supporting materials]

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