1. Purpose of Policy

This policy and procedure (P&P) describes the process DPH staff and management shall use to secure knowledgeable, experienced, and high-quality consultants, trainers, and subject matter experts. By providing these instructions, DPH means to increase efficiency and effectiveness, while maximizing training resources. Furthermore, this instruction will help to support consistency and quality throughout DPH, while endeavoring to meet workforce development goals.

Note: This P&P does not include instruction related to training that offers continuing medical education (CME)/continuing education (CE)/continuing education unit (CEU) credits.

2. Policy

It is DPH policy to provide professional workforce development through continual education and learning opportunities for staff. This is done by offering high-quality training, professional development, and technical assistance as need is identified and resources become available. Ultimate responsibility for verifying certification, educational attainment, and/or experience and researching each trainer’s proficiency and impact on trainees resides with the contracting DPH branch or section.

The individuals brought in to provide workforce training may be paid or unpaid. While this P&P focuses primarily on non-DPH resources, DPH branches/sections are encouraged to utilize in-house training resources. These in-house resources should meet the same background requirements as spelled out in section 4 of this P&P.
3. Definitions

a. **Trainer/Technical Assistance Provider:** A content expert with experience conducting workplace training in their area(s) of expertise, with an established and proven background in the subject matter in question.

b. **Consultant:** A professional who provides professional or expert advice in a particular area or specialized field. A consultant has a wide knowledge of the subject matter.

c. **Subject Matter Expert (SME):** The universal designation for any individual who is considered to be an expert in one or more areas of endeavor. This expertise can be in content areas such as a public health discipline, chronic disease, etc. An SME can also be a key non-content member of a training or instructional design team.

d. **Certification:** A comprehensive evaluation of a process, system, skill, or training topic that is measured against existing norms, standards, best practices from a recognized SME.

e. **Training Staff Lead “Staff Lead”:** A staff-person working in a DPH branch/section who is responsible for establishing training needs and identifying the resource(s) to meet those needs. Each branch/section may identify as many Leads as is necessary, and each Lead may work individually or with a team, as necessary.

4. Procedures

This section of the P&P describes the process each Training Staff Lead (Staff Lead) shall follow to secure competent and qualified trainers, consultants, and SME. The Staff Lead is responsible for each of these steps, either directly or indirectly (by delegating to colleagues). These steps are the basics to be followed by all DPH sections/branches engaging in work-force development outside of the formal CME process.

A. **Establish the Need:** Before making a decision to provide training or other staff education, there should be an established and verified need. This need should be determined through, but not necessarily be limited to, the following:

   a. A Training Plan or other document outlining the workforce education requirements for the section; and/or

   b. A Supervisor’s plan for staff development, which may be determined through staff feedback (during performance reviews, a survey, for example), a newly determined focus, or project area that requires specialized skill, etc.; and/or

   c. Grant requirements.

B. **Verify Feasibility:** Once a legitimate need has been established, the Staff Lead will endeavor to ensure that a high-quality training is feasible by establishing the following:

   a. Sufficient funding availability;
b. Logistical requirements and the availability of these requirements; and

c. Level of interest and ability of staff to participate in the training.

C. Develop a Training Plan: Each training should be defined and described in a simple document that will be provided to the trainer to ensure that the goals and objectives are made clear, concise, and agreed upon in advance. This plan shall include at least the following:

a. Title of the training

b. Length of training and timing (date span)

c. Brief description

d. Training outcomes

   i. The outcomes should be specific, attainable, and measurable. Outcomes highlight what participants should know and be able to do as a result of the training experience.

e. Training level: Beginning, intermediate, or advanced.

D. Obtain Approval: The Staff Lead shall confirm with the appropriate Supervisor that the Training Plan is acceptable, has an appropriate funding source (as necessary), and will fill in any details needed for that training.

E. Find a Qualified Professional: The Staff Lead should conduct research for an appropriate professional to meet the training needs, as described in the Training Plan. The Staff shall create a list of qualified professionals with whom to make contact. The following steps may be utilized in this search (other steps may be pursued, as appropriate):

a. Query the section/branch or other parts of DPH for staff who may be able and willing to provide the training. DPH has a large staff with many talents; utilizing in-house professionals may be the best route.

b. Review City and County of San Francisco (CCSF) resources and approved vendors through the Human Resources Department’s Workforce Development Section. Using an existing vendor will save time. If a new vendor needs to be added to the CCSF approved-vendor list, this will take up to six months.

c. Look to professionals used in the past. When using professionals for a second (or multiple) time(s), the Staff Lead shall review post-training surveys to ensure that the training was well-received and successful in meeting objectives.

d. Contact local colleges and universities for specialized training needs.

e. Find new resources through the following resources:

   i. Online sources;
ii. Personal referrals (DPH staff and trainers used in the past will be a good source of word-of-mouth referrals); and/or

iii. Professional organizations and directories.

F. **Confirm training:** The Staff Lead is required to follow the Department’s Request for Proposal and contracting process, as appropriate. The Staff Lead shall decide upon the best professional based on the review of materials submitted and in consultation with the section/branch supervisor. Based upon positive verbal and/or written confirmation, the Staff Lead will proceed with contracting with trainer or consultant.

G. **Evaluation:** The Staff Lead shall ensure that each training has a pre- and post-training survey. This information should be shared among DPH sections/branches and used to identify training resources that should/should not be used in the future.