Training Management Manual

for Civil Society Organizations

Jordan Civil Society Program 2011

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2011

Acknowledgments

The Training Management Manual (TMM) is one of the Jordan Civil Society Program's (CSP) technical assistance resources for non-governmental organizations (NGOs). Developed with support from USAID/Jordan, this Manual is designed in response to consultations with Jordan's NGO training providers and trainers and aims to support NGOs and trainers in effectively managing all aspects of training, including design, implementation and evaluation. Produced in both Arabic and English, CSP believes that this tool is unique to Jordan and will enhance the quality of training delivered to and by Jordan's NGOs.

The TMM is the fruit of the efforts and experience of CSP staff, as well as Jordanian, regional and international technical specialists who have spent their careers helping NGOs implement effective training programs.

Special thanks go to the contributors of this publication:

- **Micheline El Housseini-Timbrell** of PHI Management in Beirut, Lebanon. Our lead author, she provided the foundation on which this manual is built and ensured that international best practices in training standards are integrated throughout.
- **Lance Lawrence**, our senior monitoring and evaluation advisor, who applied his long experience in M&E to the training setting and worked with us to create tools and templates that Jordanian NGOs can apply within their organizations.
- **Dalia Farouki**, the lead Jordanian contributor who ensured that this manual is relevant to the Jordanian context as well as contributing to sections of the manual.
- **Abeer Al Tal** for her contribution to sections of the manual.

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Introduction

The Training Management Manual is designed to assist NGOs and the trainers they work with to more effectively manage the design, delivery and evaluation of training programs, whether delivered in-house or externally. Capacity strengthening may seem a daunting task for an NGO since any such efforts must be directed toward improved performance and service delivery as an end result. This Manual is designed to serve as an essential tool, not only for administering individual training workshops but, in the larger context, for strengthening the capacity of NGOs to better respond to the needs of beneficiaries who depend on organizations such as yours.

Non-governmental organizations seeking resources for their programs may also find recommendations in this Manual useful to becoming stronger organizations and, therefore, more competitive in efforts to pursue funding and opportunities from a diverse range of donors. Whether an organization is focused on health, education, civil society, microenterprise, agriculture, women's empowerment or other technical areas, the same best practices in managing and implementing training programs apply.

If you have comments, please write to the editors at info@csp-jordan.org

Why This Manual?

Training has acquired an important role in Jordan's civil society sector, with NGOs implementing a variety of training services that vary in topic, depth and reach. However, most training activities tend to be an extension of classroom-style education, usually involving lectures as the primary medium of communication. The Manual is intended to bridge the gap between the sophistication of topics and skills that are the core of training services currently delivered in Jordan and the mechanisms used to plan for, design, implement, manage and evaluate the delivery of this content to various target groups.

The Manual is based on a comprehensive consultation process with trainers and NGO leaders to identify the priorities and needs, as well as challenges and opportunities that decision-makers face with regard to managing how their training units operate, how they allocate the necessary resources and how they evaluate its impact. Focus groups were held with 24 training professionals representing three different groups: NGOs whose core mission includes training, NGOs who integrate training in various project plans, and freelance trainers providing training services to NGOs. This process in turn contributed to collecting data and information about the training situation, both perceived and experienced, and to the understanding of how each group implements a training cycle.

The Manual is designed as both a capacity-building tool and desktop reference and is intended to serve as an engaging and informative resource to strengthen your NGO's training efforts to be more strategic, organized and integral to your overall performance objectives.

Who Is the Manual For?

Many topics addressed by this Manual apply to trainers as well as program managers and NGO leaders who play a role in managing or implementing training programs that your organization offers, as well as the professional development of an NGO's in-house staff. The training function of an NGO exists to support and reinforce its strategy, recognizing that the development of NGO employees and local communities is crucial to the fulfillment of the NGO's objectives.

Regardless of whether training is a stated goal of your organization's mission or operations, this Manual is a relevant resource to help organize and streamline your capacity-building efforts, both internal and external. The Manual presents systems and processes that organizations need to address in every phase of training management—from conducting training needs assessments, to designing training interventions, curricula development, implementation and logistics, to evaluating the impact of the learning on your target group.

A variety of personnel can benefit from the use of this Manual, including:

- Training department team members: internal trainers, training officers, administrative staff, managers, coordinators, supervisors
- Human resources managers and program team leaders
- Freelance trainers and consultants (all levels)
- NGO directors, managers, team members (even if no training department exists within the NGO)
- Anyone interested in developing his/her knowledge in the area of adult learning

How Is the Manual Organized?

Chapter One of the Manual defines the strategic training role that NGOs have and introduces the idea of creating a training policy with a dedicated staff and mission. Regardless of the size of your organization, this chapter can assist in evaluating what level of organization your training service provision requires. Chapter Two covers the training needs analysis and the development of training plans. Chapter Three focuses on the design of training content, with Chapter Four focusing on the organization, administration and implementation of training programs. Chapter Five is dedicated to the evaluation of training, an area often ignored by NGOs, but crucial to monitoring the impact of the organization's work. Templates, case studies and examples for each of these chapters are included in the appendices.

How to Use This Manual

The Manual is designed to be read like a book or consulted as a desktop reference and is developed in a way that allows for it to be utilized as a whole or as stand-alone chapters, depending on the needs of the organization and/or trainer. The table of contents at the beginning and the index at the end can help you quickly find the specific information you need. Many of the chapters provide detailed, step-by-step instructions and the templates are available in electronic version in English and Arabic for customization by the NGO and/or trainer.

It can be used as a technical tool for trainers and managers who implement training activities, teaching interactive, learner-centered methods in a simplified and straight forward manner. However it is not intended to replace any training-of-trainer courses and instead provides background information and sets standards.

Because every training situation is different and each training program must address the special needs of its participants, trainers and administrators using this manual are encouraged to keep referring to specific learner needs and adapt information provided here as required.

How Does the Manual Relate to the Training Standards Review?

The Training Standards Review (TSR) is a tool developed by CSP in conjunction with PHI Management to ensure a consistent application of training standards, capitalize on the areas of strength and identify areas of improvement related to the NGO's training department.

The Training Standards Review is an auditing tool that is an independent, objective and consultative activity designed to add value and improve an NGO's training operations. The TSR helps an NGO accomplish its objectives by bringing a systematic, disciplined approach to organizing, evaluating and improving training standards. Conducted by an external reviewer, the review capitalizes on the areas of strength and allocates areas of improvement related to an NGO's training systems.

The Manual holds the answers to many of the questions that arise when an NGO conducts the TSR and offers best practices, know-how and systems to close the gaps identified by the TSR.

The TSR is posted at www.csp-jordan.org, and is available at www.NGOconnect.net

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Online Tips

Online readers will be able to click on the chapter they are interested to view its Contents and that will take them directly to the desired chapter. The online user can also download and fill-in different templates in their PDF format.

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Chapter One

Strategic Training Role

Strategic Training Role

1.1 Strategic Framework

The NGO contributes to advocacy and civil society developmental issues, working either independently, cooperatively with other NGOs or through receiving funds to carry out its operations.

The NGO strategy influences how the NGO uses physical capital (building, technology and equipment), financial capital (assets, funds) and human capital (employees).

The Training function of the NGO exists to support and reinforce its strategy. It recognizes that the development of NGO employees and the local communities is crucial in the fulfillment of the NGO's objectives. The NGO trainings are committed to:

- Helping individuals in the acquisition of knowledge, skills and behaviors needed to perform their jobs
- Providing opportunities to learn based on 'needs analysis', which is relevant to the individuals, groups or specific projects both inside and outside the NGO
- Developing leadership qualities
- Strengthening local communities and civil society

NGO Strategic Framework
Mission, Vision, Values, Objectives

↓

Strategic Training Role
Linked to the NGO strategy

↓

Training Activities
Identification & implementation of activities

↓

Measurement Metrics
Tools to measure the success of the activities

The NGO's Management is responsible for developing the Mission, Vision and Value Statements of the NGO, and needs to revisit/revise these statements annually. In revising the statements, the Management should evaluate whether the NGO's function is still consistent with its Mission and with the community's needs.

In order to have a successful department, the Training Manager needs to establish a strategic framework for the NGO's Training function. All components of the framework should be approved by the NGO Management. The framework consists of a:

1. Training Mission Statement
2. Training Vision Statement
3. NGO Values
4. Training Department Objectives
5. Training Department Strategic Plan

1. Training Mission Statement

The Training Mission Statement is a brief description of the department's purpose and it answers the question "Why do we exist as a Training Department within the NGO?".

A well-defined Mission Statement should be in-line with the NGO's Mission Statement and will help guide the Training Team in making crucial decisions about programming and resource allocation.

Examples of Mission Statement
'The mission of the Park University Training Department is to continuously improve the knowledge, skills, and abilities of all employees so that they are able to think critically and communicate effectively, adjust to a changing environment, and enhance the quality of their work. This will be accomplished by implementing a cohesive training and development plan by using innovative learning concepts and technology'. *Park University – Training department (www.park.edu)*
'The mission of the Training & Employee Development (TED) department is to provide timely and structured learning experiences, operational training, and career development programs to all Client Services Division employees to improve and maintain job performance to support the stated corporate business goals'. *http://www.gccaz.edu/*

2. Training Vision Statement

'A Vision Statement provides a broad picture of what the future might look like. It provides the basis for formulating and implementing strategic plans'.
(From Armstrong's Handbook of Management and Leadership, by Michael Armstrong; Published by Kogan Page)

The Training Department's vision is an inspiring statement about what the department wants to become. It forms the basis of the department's objectives.

Examples of Vision Statements
To be a leading entity to provide training, knowledge and consulting services all over the world in the fields of self development and human resources development for individuals and business societies. *www.leaderships.org*
To be recognized and respected as one of the premier associations of HR Professionals. *HR Association of Greater Detroit*

3. NGO Values

The NGO Values (also called 'Core Values') are the explicit expressions and descriptions of the required behavior and ways of "doing things" that shape the NGO culture. The NGO Management is responsible for setting the values of the NGO.

The Training Manager do not need to develop a separate set of values for the Training department, as all the teams, in all departments should follow the same NGO values in every action they take.

Examples of NGO Values
- Transparency - Accountability - Professional integrity - Gender sensitivity - Mutual respect http://www.ngoforum.or.ug/about/plan/structure.htm - top *The Uganda National NGO (www.ngoforum.or.ug)*

4. Training Department Objectives

In the book 'The Strategy Focused Organization', Robert Kaplan and David Norton said:

'A mere 7% of employees today fully understand their company's business strategies and what's expected of them in order to achieve company goals'

This suggests that the majority of employees are working in some kind of vacuum, not fully understanding why they are doing the things they do or why their contributions can, and do, influence the success of the company. In the case of an NGO, if this situation persists;

- NGO strategies and goals may not be achieved or exceeded due to lack of focus
- NGO employees may not function at their full potential

Communicating the NGO strategy and goals helps to ensure that the day-to-day actions of all NGO employees contribute to the achievement of the set strategies and goals.

Every year, the NGO Management should meet to review the established strategies. Existing strategies are maintained or adjusted according to the needs of the NGO environment and/or new strategies are developed.

These strategies should be promoted throughout the NGO at the beginning of the year.
The Training Manager must then:

- Determine the critical actions that need to be taken to achieve the NGO strategies
- Set departmental objectives and measurable goals
- Develop action plans detailing what has to happen, how it should be done and by when
- Assign responsibility for each activity to various teams and people

Part of the Training Manager's role is to link the NGO objectives to the Training Department Objectives so that the activities he/she schedules will be aligned with the NGO Strategic Framework.

On a yearly basis, he/she needs to identify the department's objectives, discuss them with the NGO Management and get them approved before engaging in related activities.

Aligned Training Objectives to the NGO Objectives		
Example of NGO Objective	Training Department Objectives (linked to NGO objectives)	Related Training\ Activities
- Improve levels of adult literacy, and provide equitable access to basic and continuous education during 2010	- Achieve 50% improvement in levels of adult literacy by September 2010, especially for women - Provide 'English for Beginners' to cover 70% of adults by end of 2010	- Search for external providers of English courses - Get Management approval - Conduct literacy assessment for all women - Conduct English assessment for adults - Finalize lists of selected candidates in both courses - Conduct programs - Schedule assessment tests post-programs, etc... - Issue final report about success of the programs

5. Training Department Strategic Plan

The Training Department Strategic Plan forms part of the broader planning cycle at the NGO. When preparing the Training Strategic Plan, you can follow these steps:

Training Department Strategic Plan	
1.Review Performance of the Department	- Review the Training Department's performance against last year's objectives - Consider activities which should be continued, modified or abolished
2. Conduct Training Needs Analysis	- (Check chapter 2 in the manual)
3. Compile your Plan	- Establish priorities for the year - Include between four to seven meaningful objectives - Maintain simplified format
4. Present your Plan	- Internally to the NGO Management team for endorsement
5. Implement your Plan	- Develop a timetable to cover key items addressed in your plan
6. Review your Plan	- Create a quarterly review in order to modify your plan and keep priorities in line with changes that occur within the NGO - Share your quarterly successes with your Management Team

Related documents

- *Training Department Strategic Plan (Template 1.1)*

1.2 Training Department Structure

This section raises awareness regarding the range of options within the Training Department's structure in educational NGOs. It also explores some of the benefits and drawbacks in relation to each option.

Before discussing the Training Department structure, it is important for one to understand some points related to the NGO stages of development. This is significant as the level of the NGO may help to determine the department's structure.

NGOs can have various stages of development depending on the following factors:

- NGO Management Systems
- NGO Financial Resources
- External Relations
- NGO Programs/Services Delivery

Four Stages of NGO Development	
Stage 1	NGO at the 'Start-up stage'
Stage 2	NGO at the 'Growing stage'
Stage 3	NGO at the 'Expanding stage'
Stage 4	NGO at the 'Fully Functional stage'

Having an exclusive Training Department works best when the NGO provides a high volume of training either inside or outside the NGO.

At any stage, outsourced services can be implemented depending on the need (specific technical skills trainer, instructional designer, etc…)

NGO Stages	Training Department Headcount	External Assistance
"Start-up stage' and 'Growing stage' (Up to 20 employees in the NGO	Training Manager	Possible use of external trainer
'Expanding stage' and 'Fully Functional stage' (Up to 100 employees in the NGO)	Training Manager + Training Coordinator (or administrator)	Possible use of external trainer

1.2.1 Organization Chart

In all cases, no matter what the Training Department's structure is at the NGO, the department should have an organization chart posted in a visible employee area. The reporting lines must be reflected in the organization chart.

1.3 Training Roles and Responsibilities

The personal requirements and roles of the Training Team members are highlighted in three forms: Job Descriptions, Job Specifications, and Competencies Framework.

1. Job Descriptions

The job description is a written summary of the tasks, responsibilities and duties of a job.

- With the assistance of Human Resources, the Training Manager is responsible for preparing job descriptions for the entire Training Team. It is good practice to consult the employee who currently holds the job when preparing a job description because they have first-hand experience regarding what the job involves.
- Good job descriptions should be concise but comprehensive, covering all key aspects of the role the job fulfills.
- Each employee will be issued a Job Description upon appointment to a new position. Job descriptions should be attached to each offer letter, including promotions or transfers within the NGO.

Job descriptions are also essential for:

- Performance Reviews, Feedback, Coaching and Assessments
- Training & Development
- Discipline & Grievance
- Determining Manning Levels (number of employees by department)

Related documents
- *Job Description Format, Training Manager (Template 1.2)*
- *Job Description Format, Training Coordinator (Template 1.3)*

2. Job Specifications

The job specification is a statement of the employee characteristics and qualifications required for satisfactory performance of defined duties and tasks comprising a specific job or function.

While the job description tells what the job holder is expected to do, the job specifications form describes the specific experience and competencies the person will need to perform the job.

Related documents

- *Job Specification Format, Training Manager (Template 1.4)*
- *Job Specification Format, Training Coordinator (Template 1.5)*

3. Competencies Framework

Competencies are the measurable or observable knowledge, skills, abilities, and behaviors critical to successful job performance. An advanced NGO will develop its 'competencies framework' which supports consistency in the Human Resources processes and is a 'common language' to communicate the NGO's expectation of effective performance.

The competencies framework supports the NGO in:

- Recruitment & Selection - by helping the NGO in hiring the best people available
- Performance Appraisals - by clarifying job and work expectations
- Training - by targeting performance gaps

In order to deliver tasks to the required standards, employees must have the necessary skills and knowledge. This is sometimes referred to as having the necessary technical competencies. However, the approach that employees take to various work activities is known as behavioral competencies. These are the underlying personal characteristics of a person that when applied to the work, result in effective and/or superior performance on the job. These personal characteristics include:

- Values – personal beliefs which are meaningful to a person.

- Attitude – the way a person thinks or feels about something, which influences the way they act or react (behave) in a particular situation.

- Aptitude – inherent or acquired ability which suggests the person has the potential to learn certain skills or knowledge e.g. being good with numbers (accountancy), languages (learning a new language), machines (mechanical processes).

- Personality Traits – a person's consistent responses to situations and information e.g. being extrovert, assertive, competitive, independent.

- Motives – the things a person consistently thinks about or wants, which cause action. Motives drive and direct behavior towards or away from particular actions or goals.

Technical skills & knowledge (competence) is about 'what' a person does and behavioral competencies are about 'how' a person does something. It is the combination of these things that results in effective performance.

We only see evidence of someone's competencies (how they do something) by the way they behave in the workplace while performing a job. It's relatively easy to train and develop a person's skills and knowledge but because someone's personal characteristics are so deeply rooted, we cannot fundamentally change them. We may be able to modify or enhance but we cannot train someone in competencies they do not have in the first place.

Related documents

- *Sample Competencies Framework (Mango – UK) (Template 1.6)*

4. A More Diverse Role

The role of the Training Manager at the NGO is evolving to encompass new responsibilities, including acting as Coach or Mentor, facilitator, change agent, assessor, etc... Each of these new roles requires the development of an enhanced skill set.

Role of 'Coach'

Traditionally, coaching was something that might only have been offered to senior managers. However, as more and more people become aware of the benefits of one-on-one support, coaches may be found operating at a number of levels within an NGO.

If people really begin to adopt coaching behaviors, the NGO becomes much more of a learning environment. Once an employee has attended a training event, the newly absorbed skills, knowledge, behaviors and attitudes need to be reinforced. In some way what has been learned must be rapidly refreshed back in the workplace. This reinforcement of an employee's learning is one of the prime roles of the coach.

Role of 'Mentor'

A mentor is usually nominated to provide guidance and insight to others. They also understand how things can go wrong and can assist their trainees to cope with difficult times.

As a Training member, you are ideally placed to take a role as a mentor. Typically you have developed, through the training role, a wide knowledge of the NGO, its strategy, its ways of working and the key people.

Role of 'Facilitator'

Acting as facilitator should be a natural extension of the trainer's role. An experienced trainer will normally be using facilitative skills in group meetings.

As a facilitator, you are there to help and ease the process, using an enhanced skill set. This means you will work with the group through set procedures to reach a conclusion. You should have the ability to remain objective and to rise above the detail of the debate. Your goal is to enable the group to work together, respecting each other's viewpoint and participating fully.

Role of 'Change Agent'

People often feel uncomfortable when shifted from the status quo. Negativity grows very easily and there is often tremendous resistance which manifests itself in statements such as 'We've always done it this way,' or, 'I don't know why we have to change, it won't work.'

This is why the concept of a 'change agent' has emerged; these people once identified work within NGOs, fostering a positive approach, working with, rather than against management.

Role of 'Assessor'

In your work at the NGO, there will be many opportunities where you will conduct assessments of various types:

- Assess employees' progress against agreed objectives
- Assess Training Needs
- Assess new recruits against selection criteria
- Assess annual performance against NGO competencies

1.4 Recruitment & Selection Process

If the selection interview is to be a successful indicator of high Training performers, then you need to take a systematic and structured approach to planning, conducting and evaluating interviews at the NGO, rather than relying on your 'gut feelings' about people.

This involves a planned interview outline uniformly implemented on all candidates who apply for a Training job and planned job related questions, consistently asked to each candidate applying for the same position, so that responses can be compared.

The Recruitment & Selection process comprises the following stages:

Stages of the Recruitment & Selection Process	
1	Review Job description and Job specification
2	Advertise the job
3	Shortlist candidates
4	Review CV/resume
5	Conduct interviews
6	Make the selection decision
7	Offer the job

1. Review Job Description and Job Specification

- The aim of the selection process is to match the Training job to be performed with the profile of the person who needs to do it successfully
- Review job duties and criteria and classify skills by priority
- Customize the Job description and Job specification forms according to the current vacancy and need

2. Advertise the job

- Internal advertising can be made in the NGO, where the vacancy will be posted in a visible location, accessible to all employees or via intranet (e-mail system)
- HR sources potential candidates through agencies, advertisement or creates a job posting on the NGO website or blog

3. Shortlist Candidates

- Applicant applies – submitting CV or completing application form and, where appropriate, completing a Predictive Index Survey
- HR reviews application form and CV to verify suitability, as well as cross checks applicants with Job specifications
- Prepare a short list of potential candidates

4. Review CV/Resume

Once the CV/resume has been reviewed by the Training Manager or the Human Resources, you can compare it against the Job specifications form and note down any points you want to check or gather further information on. You should then prepare a list of the main areas you want to explore during the interview and plan the questions you want to ask.

In reviewing a candidate's CV or resume, you should check for the following:

- How long has the candidate been in each Training job? Is there a butterfly pattern? Do they get itchy feet after a set amount of time in each job?
- Are there any employment gaps? Did they take voluntary time out for personal development or were they simply unable to find work?
- Does the job history show steady progression? Is the job applied for a logical career step? Have they been involved in working with/supervising/managing people? Are there any areas of concern?
- What are the candidate's personal details – mobility, languages etc.? What impact might this have on the job? You should be careful that any conclusions drawn from this are in no way discriminatory against the candidate.
- What hobbies or interests do they have (if listed)? Are they outgoing or a loner?
- What key information is missing? Have they left out other key information such as educational information etc…
- References.

5. Conduct Interviews

Ideally, all interviewers at the NGO need to attend training programs related to recruitment and selection. The application of Competency-based interviewing techniques and psychometric tools are optional.

Below are recommendations to take into consideration at each phase of the interview:

Opening the Interview

It's important to put the candidate at ease to help you to get more spontaneous and honest answers to the questions you put forth. Ways in which you can do this include:

- Don't leave candidates waiting
- Welcome them warmly
- Smile, Shake hands, Introduce yourself
- Offer tea or coffee if available
- Sit in a reasonably relaxed manner – no arms folded
- Avoid physical barriers i.e. desks
- Explain the format for the interview
- Explain that you will be taking notes during the interview
- Establish rapport using neutral questions (travel, weather etc.), which will help to relax the candidate and may also reveal important information about the candidate

During the Interview

There are several key areas that will provide relevant information about the candidate that you need to cover. These are:

- Education and qualifications
- Previous Experience
- Knowledge and skills
- Competencies for the Training role

In many countries, it is unlawful to discriminate against a person by asking questions relating to: Race, Colour, Religion, Gender, National origin, Age, Marital/family status, Mental/physical disabilities.

When exploring key areas with the candidate at the interview, we should be very conscious of the 'Halo and Horns' effect:

The HALO effect is having a good feeling about a candidate and continuing to ask easy questions to confirm your views e.g. the candidate arrives for the interview looking immaculate and creates a good 'first impression' so we ignore any negative responses during the rest of the interview.

The HORNS effect occurs when something happens early on in the interview which creates a bad impression which continues on throughout the interview e.g. the candidate arrives late for the interview, and while this is important to note, it should not be allowed to outweigh any other positive evidence gained.

Examples of the HALO Effect:

- Past Record: Because the candidate appears to have performed well in one job in the past, the interviewer assumes that the candidate is okay in the most recent jobs, despite any evidence he/she might have to the contrary, or vice versa.

- Compatibility: The interviewer treats the candidate more favourably than the candidate deserves because the candidate has a pleasing manner and personality.

- One Asset Person: The interviewer treats the candidate more favourably than he/she deserves because the candidate has an impressive appearance or advanced degree, or is a graduate of the interviewer's own school/university.

- Blind-spot: The interviewer does not see certain types of defects in a candidate because they are just like his or her own.

Examples of the HORNS Effect:

- Unrealistic Expectations: Because the person specification or the interviewer's expectations for performance are so high, he/she looks on the candidate less favourably than the candidate deserves.

- Snap Judgements: The interviewer makes judgements about the candidate far too quickly – within the first few seconds of meeting him/her – and then the interview becomes a means of gathering information to reinforce those judgements.

- Personal Biases: The interviewer discriminates against the candidate because of his/her own personal biases or prejudice e.g. to ethnic minorities, candidates that don't have a firm handshake etc...

- Dramatic Incident: The interviewer allows a performance challenge in a recent job to wipe out the candidate's successful performance in all other past jobs.

- Incompatibility: The interviewer looks at the candidate negatively because the candidate is too shy or too cocky or lacks a personality trait the interviewer has.

Closing the Interview

In closing the interview with the candidate:

- Give the candidate the opportunity to ask questions
- Check that he/she is still interested in the job
- Let them know what will happen next and when
- Thank them for coming

6. Make the selection decision

- Making selection decisions is never a straightforward process. If there was only one interviewer, perhaps it would be easier
- Use the 'Interview Assessment Sheet' (Template 1.8)
- Your NGO may require candidates to be interviewed by at least two people. In this situation, you obviously should hold a 'wash up' meeting between all the interviewers to discuss the relative strengths and weaknesses of each candidate

7. Offer the job

- The Human Resources (HR) department at the NGO is responsible for issuing and following up on the offer letter and for communicating the start date of the candidate to you
- HR checks references (except for current employer – unless cleared by the candidate)
- Other candidates prioritized as 'reserves' in case top candidate does not accept offer
- If the candidate rejects the offer, you should find out why. Following this, you will need to look at the second choice of candidate but only if this person is right for the position, If there is no second choice then you will need to re-interview for the position
- Unsuccessful candidates should be sent a regret letter, or an e-mail when available, within seven days of the position being closed

1.4.1 Behavioral Interviewing Theory (Competency-Based Interviewing)

Behavioral interviewing focuses on asking questions about actual and specific situations that a candidate has experienced in the past to determine if they have behaved in a way consistent with job specific competencies.

This ensures that we assess the candidate's suitability for the job by:

- Gathering relevant information in predetermined topic areas
- Getting the candidates to talk about themselves; not about ideas or other peoples' theories
- Collecting details of actual past performance, to clarify exactly what they did or said

The theory behind 'Behavioral Interviewing' is the belief that past behavior is the best predictor of future performance, given similar conditions. If we find out at the interview how the candidate reacted to situations in the past – we have a good idea of what they will do in the future.

Behavioral scientists believe that people's behavioral patterns are stable and persistent over time, changing only gradually. You probably know how difficult it is to change your behavior.

This theory suggests that given similar circumstances an individual will repeat past behaviors. Therefore, if we find out during the interview how a candidate reacted to incidents in the past, then we'll have a reasonably accurate indication of what they will be likely to do in the future. For example, if we ask them how they dealt with an emergency or a difficult trainee in their last job – it will give us an indication of how they will behave when the same situation occurs in the future.

Related documents

- *Recruitment Advertising Form (Template 1.7)*
- *Interview Assessment Sheet (Template 1.8)*
- *Competency-Based Interview Sheet (Template 1.9)*

1.5 Training Policies

The Training Policies provide a framework within which decisions can be made and supported with regard to the development of individuals and groups within the NGO. They outline the authority given to the Training Department, as well as its limitations.

The Training Policies should be written by the Training Manager, reviewed with and approved by the NGO Management. Training Policies should be shared and accessible to all NGO employees.

The policy format (Template 1.10) need to include:

- The policy number
- The effective date
- The issue date
- The review date

<table>
<tr><td colspan="2">Training Department - Policies Manual</td></tr>
<tr><td rowspan="2">Policy Number: TRG 01

Effective Date: 1 January 2009

Issue Date: 1 January 2009

Review Date: 1 June 2009</td><td>Insert NGO Logo</td></tr>
<tr><td>Insert Policy Number</td></tr>
<tr><td colspan="2">Policy Objective
(Text)

Policy Guidelines
(Text)</td></tr>
</table>

Related documents

- *Empty Policy Format (Template 1.10)*
- *Sample Training Policies (Templates 1.11, 1.12, 1.13 & 1.14)*

1.6 Standards of Performance (SOPs)

Each training activity or training process at the NGO will have a 'Standard of Performance (Template 1.15)/Task Breakdown' which details the steps and associated standards of this task as it should be performed by the Training Employee.

In order to write Standards of Performance, the Job Description of the related position should be used. Each duty listed in the Job Description is broken down into a list of tasks. After that, the Standards of Performance can be developed.

Example
Job Description: Training Coordinator
One of the duties: Generate the monthly reports of the Training Department
Job breakdown (related to 'reports'): Generate monthly Training Report, monthly No-show Report, monthly Training Expenditures Report, etc…
Standard of Performance (SOP) (Monthly Training Report): - Summarize all on-job training courses - Summarize all off-job training courses - Include success stories and case studies - Include challenges and lessons learnt - Etc…

- The Standards of Performance of the Training department are written by the Training Manager after completion of the Train-The-Trainer (TTT) program. All SOPs should be approved by the NGO Management.
- The Standards of Performance manual should be available in the Training Department, maintained and kept up-to-date by the training team.
- Standards of Performance should be communicated through memos, meetings, notice boards, on-Job and off-Job training.

Related documents

- Standards of Performance (SOP) Sample (Template 1.15)

1.7 Training Facilities

Training facilities at the NGO are critical in order to provide a high quality learning experience. The training venue and some equipment can be outsourced/ borrowed in case the NGO cannot provide them.

Requirements & Considerations	
Location	If you are outsourcing a training venue, it's better to have it easily accessible to public transportation. Check out the possibility of providing a parking space for participants with cars
Venue	The NGO's training room should cater to different training requirements, i.e. space for group work and activities. Whenever possible, having daylight in the training venue is recommended
Catering	Consider space for coffee breaks and lunches
Equipment & Tools	Here are examples of equipment and tools that you might need at the Training Department. Their availability depends on your budget: 1. Laptop 2. Color printer 3. Desks for the Training Office 4. Chairs for the Training Office 5. Filing cabinet 6. LCD projector 7. Photocopier with sorter (might be shared with other NGO departments) 8. Tape-recorder 9. Desks and chairs for training room 10. Flipchart stands 11. Write on/wipe off notice board 12. Notice boards for office 13. Camera

Requirements & Considerations	
Stationery & Supplies	Here are examples of stationery and supplies that you might need at the Training Department. Their availability depends on your budget: 1. In/out tray sets 2. Box files 3. Plastic folders 4. Stapler 5. Two hole punch 6. Spare toner 7. Calculators 8. CDs 9. Scissors 10. Post it notes 11. Pens, pencils 12. Markers, eraser 13. Masking tape 14. Paper clips 15. Rulers 16. Pads for flipchart 17. Cards (different sizes & colors) 18. Papers/notebooks 19. Glue, pins

1.8 Training Unit Budget

Planning the training budget starts as NGO board members allocate training resources. It could be part of a project proposal with funding for training (internal and/or external). The budget planning exercise commence in two levels:

1. Annual Training Budget
2. Events Budget

The responsibility of completing and approving the Training Budget relies on the Financial Manager in agreement with Training Manager. Points to take into consideration:

1. Training Events: List all training events taking place within the financial year. Consider free training too as those may require indirect costs.

2. Participants: Collect the planned or forecasted number of participants for each event from the head of the department, and add extra spaces for emergency.

3. Timing: Gather the events actual or potential timing, confirm availability with training facilities and fix events dates.

4. Cost: Based on (1) number of training event, (2) number of participants and (3) timing; make an estimate using the budget sheet (Templates 1.16 & 1.17). If the training event is outsourced, seek initial pricing to include in the training budget sheet.

The Training Budget needs to be drafted and approved two months prior to new financial year's start date.

Related documents

- *Training Budget (Yearly) (Template 1.16)*
- *Training Budget (Event) (Template 1.17)*

1.9 Development Plan for Training Team

The development of the Training can range from the basic programs to a more formal type of accreditation:

- Induction to the NGO
- Language training
- IT expertise (MS PowerPoint, Excel)
- Teambuilding
- Time management
- Train-The-Trainer
- Coaching
- Training delivery
- Performance management
- Coaching
- Neuro-Linguistic Program (NLP)
- Emotional Intelligence (EQ)
- Chartered Institute of Personnel and Development (CIPD)
- Etc…

The Personal Development Plan (PDP) is usually issued based on specific development needs and, in most times, after an appraisal has been done to the concerned employee.

Your Personal Development Plan should reflect the activities you will need to undertake to meet your personal objectives. Such a plan may be provided by the NGO (part of the Performance Management System) or you may have to design your own. The plan's objective is to improve your performance in your current position and prepare you for future growth.

Before drafting your PDP, you should be seeking the advice of the NGO Management, coaches and mentor. Also consider people you know who seem to have planned their way into a successful career.

1.9.1 Your Development Options

- Through formal courses aimed at qualifications including PhD or MBA at universities and business schools
- General business courses, perhaps leading to an MBA. This will be a massive career step, particularly if all or part of it will be self-funded
- Join an association, such as the CIPD (Chartered Institute of Personnel and Development). This will provide you with a supply of news and views about developments in the marketplace and is an excellent way of building your personal network

The format for Personal Development Plan (Template 1.19) includes the following information:

- Area of Strength/Area to Improve – a broad statement of the area of strength to build on or development area to be improved e.g. coaching skills, meeting management, on-job trainer skills, interpreting financial statements, etc…
- Learning Objective – what you, the trainee, plan to achieve through the learning activity
- Action Steps/Dates – a list of steps involved and the date by which each step should be completed
- Support Required – who will be required to support you, the trainee, in each action step, if required e.g. who will organize the activity, who needs to be consulted before the activity can be carried out or who need to approve the activity
- Review Method/Date – how the actions will be reviewed to determine if the learning objective was met

1.9.2 What suits you best?

Successful learning is often about ‘making it works for you’. While we all learn from a variety of methods, some of us learn best by following a particular process: Do you for example, prefer to:

- Experiment with new things to try? *Preferring variety and change*
- Carefully considering what’s happening? *Preferring to stick to known methods*
- Finding causes and working out theories? *Preferring ideas to action*
- Putting things into practice? *Preferring actions to ideas*

The way we prefer to learn has been developed into what are known as ‘learning styles’. One of the related theories was identified by 2 people: Peter Honey and Alan Mumford. Try the learning styles questionnaire (Template 2.30) to determine your preferred learning style and then read about the learning activities that might suit you best before developing your PDP.

Thinkers and Doers

Which characteristics describe you?

Characteristics of Thinkers	Characteristics of Doers
• Thorough • Methodical • Cautious • Likes to collect information • Likes to be well-prepared • Good listeners and observers • Likes theory and models	• Likes to 'have a go' • Takes risks • Tries things out • Enthusiastic • Loves practical ideas • Flexible • Spontaneous

Thinkers like to learn in order to do, and Doers like to do in order to learn. Neither learning style is right or wrong; they are just different. People can and do use both styles of learning, but tend to favor one style over another. It is important to be aware of your learning style in order to best plan your learning and to choose suitable activities.

You can also make a conscious effort to use your non-preferred learning style when appropriate. So, if you are a cautious Thinker, who likes to be well-prepared, try jumping in and 'having a go' from time to time, then reflect on the experience.

Generally speaking, the following learning opportunities suit each type of trainee:

Learning Opportunities for Thinkers	Learning Opportunities for Doers
• Plenty of data to read and research • Preparation time • Clear structure and objectives • Concepts and models • Logical sequencing	• Plenty of variety • Involvement/participation • Proven techniques • Spontaneity • Relevant articles • Tips from experts

1.9.3 Honey and Mumford's Four Learning Styles

Peter Honey and Alan Mumford identified four distinct learning styles or preference; two types of Thinker (Reflector and Theorist) and two types of Doer (Activist and Pragmatist).

Two Types of 'Thinker'

The Reflector

- They like to stand back, reflect on experiences and observe them from many different angles
- They collect data, both first hand and from others, and prefer to think about it thoroughly before coming to any conclusion
- They are cautious, thoughtful people who like to consider all possible implications before making a move
- They prefer to take a back seat in meetings and discussions
- They enjoy observing other people in action
- They listen to others and get the drift of the discussion before making their own points. They tend to adopt a low profile and have a slightly distant, tolerant, air about them. They prefer to stay with known methods and not experiment

The Theorist

- They like to adapt observations into complex but logically sound theories
- They think problems through in a vertical, step by step logical way
- They tend to be perfectionists who don't rest easy until things are tidy and fit into a rational scheme
- They like to analyze and synthesize
- They are keen on basic assumptions, principles, theories, models and systems thinking. Their approach to problems is consistently logical
- They prefer to maximize certainty and feel uncomfortable with subjective judgments, lateral thinking and anything flippant
- They may not always put their theories into practice

Two Types of 'Doer'

The Activist

- They like to be involved fully in new experiences
- They enjoy the 'here and now' and are happy to be dominated by immediate experiences
- They are open-minded, not sceptical and this tends to make them enthusiastic about anything new
- Their philosophy is "I'll try anything once"
- They tend to act first and consider the consequences afterwards
- They tackle problems by brainstorming
- As soon as the excitement from one activity has died down they are busy looking for the next
- They tend to thrive on the challenge of new experiences but are bored with implementation and longer term consolidation
- They are out-going people

The Pragmatist

- Is keen on trying out ideas, theories and techniques to see if they work in practice
- They positively search out new ideas and take the first opportunity to experiment with applications
- They are the sort of people who return from management courses full of new ideas that they want to try out in practice
- They like to get on with things and act quickly and confidently on ideas that attract them
- They tend to be impatient with lots of reflection and open-ended discussions
- They respond to problems and opportunities as a 'challenge'
- Their philosophy is "There is always a better way" and "if it works its good"

1.9.4 Learning Options and Learning Styles

Review the table below to see which learning methods best suit you

***	High match with your learning style
**	Medium match with your learning style
*	Low match with your learning style
(Blank)	This method does not suit your learning style

Learning Option	Activist	Reflector	Theorist	Pragmatist
Off-job learning				
Lectures		**	***	*
Case studies		***	*	**
Group discussion		***	*	***
Reading		**	***	
Simulations	**	**	*	**
Role plays	**	**	*	**
Outdoor training	***	*		**
Being a trainer	***	*		**
Online learning	*	**	**	**
Internet communities/newsletters	*	***	*	**
Visit other departments	**	***		**
External benchmarking	**	***		**

Learning Option	Activist	Reflector	Theorist	Pragmatist
Job-based learning				
Being coached	**	**	*	***
Coaching others	**	*		**
Trainees responsibilities	***	*		***
Acting appointment	***	*		**
Travel	***	**		**
Professional Affiliation	*	***	**	**
New challenge	***	*		***
Watching others	*	***	*	**
Using the intranet	***	***	**	*
Special project	***	*	*	***

Related documents

- *Personal Development Plan Format (Template 1.18)*
- *Personal Development Plan Sample (Template 1.19)*

Documents & Templates

- *Training Department Strategic Plan (Template 1.1)*
- *Job Description Format, Training Manager (Template 1.2)*
- *Job Description Format, Training Coordinator (Template 1.3)*
- *Job Specifications Format, Training Manager (Template 1.4)*
- *Job Specifications Format, Training Coordinator (Template 1.5)*
- *Sample Competencies Framework (Mango – UK) (Template 1.6)*
- *Recruitment Advertising Form (Template 1.7)*
- *Interview Assessment Sheet (Template 1.8)*
- *Competency-Based Interview Sheet (Template 1.9)*
- *Empty Policy Format (Template 1.10)*
- *Sample Policies (Templates 1.11, 1.12, 1.13 & 1.14)*
- *SOP Sample (Template 1.15)*
- *Training Budget (Yearly) (Template 1.16)*
- *Training Budget (Event) (Template 1.17)*
- *Personal Development Plan Format (Template 1.18)*
- *Personal Development Plan Sample (Template 1.19)*

Chapter Two

Training Needs Analysis

Training Needs Analysis

2.1 Introduction

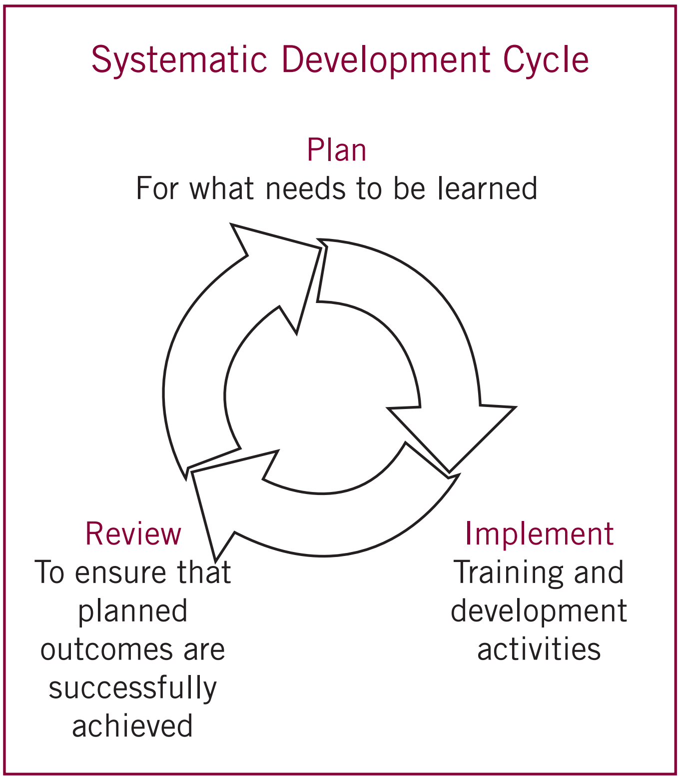
In this section of the manual, you will go through an approach that will help ensure that the training activities you are in charge of support the NGO objectives.

People often assume that training is always the best solution to performance problems; therefore, they invest in training solutions that result in entirely unexpected outcomes including a waste of trainer's time, efforts, trainees energy and sponsors investment. In order to avoid similar situations, the Training Needs Analysis (TNA) is best conducted up front, before training solutions are budgeted, designed and delivered. It should always flow from the NGO strategy and address a development need.

Prior to tackling the Training Needs Analysis' large topic in details, we will review two well-known theories in the Training and Development world, both linked to our topic. Both theories highlight the importance of the Planning/Analysis process before initiating any training activity:

1. The Systematic Development Cycle
2. The ADDIE Model

1. The Systematic Development Cycle



- Planning: involves identifying NGO needs, setting standards, identifying learning needs, setting learning objectives, planning roles & responsibilities, making a plan for what needs to be done.

- Implementing: involves starting the work, making the training activity happen, and recording activity.

- Reviewing: involves carrying out a review, and making decisions as a result.

In the NGO, any development activity that is not approached in this way, or if parts of the cycle are missed out, then no matter how good the development activity is or how good the trainee is, the results will not be as good as they could have been.

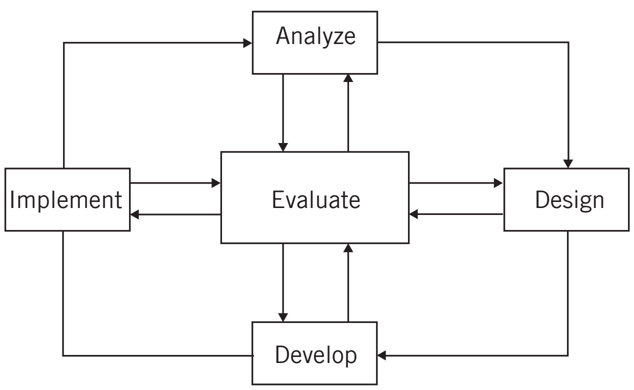
2. The ADDIE Model

When developing a training program, or any development activity, an instructional design model can be applied called the ADDIE model.

It is a systematic design model consisting of five phases:

1. Analysis
2. Design
3. Development
4. Implementation
5. Evaluation

The ADDIE Model



During the 'Analysis' phase, the designer of the Training program develops a clear understanding of the 'gaps' between the desired outcomes or behaviors, the trainees needs, existing knowledge/skills and any other relevant factors.

Analysis also considers the learning environment, any constraints, the delivery options, and the timeline for the Training project.

Therefore, your training provision at the NGO should be based on an accurate identification of requirements. Having a clear idea of training needs and of the outcomes expected provides a foundation to evaluate the effectiveness of your training activities and to demonstrate to the NGO management, donors and sponsors the impact and success of training.

2.2 Training Needs Analysis – Definition

Training Needs Analysis can be defined as "An examination of the existing need for training within an organization" (Mitchell 1993). In the case of an NGO, a Training Needs Analysis identifies performance areas where training is the best solution and needs to be applied.

A development need can be defined as 'a gap' between the performance that is required, - either currently or in the future - and the actual performance that is happening, in terms of knowledge, skills and attitude.

2.3 Training Needs Analysis – Benefits

- Training can be directly related to the NGO objectives
- Training can be tailored to and targeted at specific requirements
- Training needs can be identified and prioritized
- Better targeting of both human and financial resources

2.4 Training Needs Analysis – Scope

Training Needs Analysis can be undertaken at a number of levels:

- For the NGO as a whole. The aim here is to understand the amount of and types of training needed to ensure that all employees have the right capabilities to deliver the NGO's strategy.

  In this case, the Training Needs Analysis can be conducted either once a year when the NGO yearly priorities are set. Sometimes, it could be conducted twice a year (January/June – July/December) in order to have a more updated assessment of the NGO situation.

- For a specific NGO department or an area of work or project. Departments at the NGO may have varying developmental needs; new NGO projects may require different ways of working (i.e. automation of a specific work area).

- For a project or training program implemented by the NGO. Implementing a special training program outside the NGO (i.e. conducting the 'Empowerment of Women' training for a specific community).

- For specific NGO individuals. Linking their personal training and development needs to those of the work (i.e. the proficiency of all NGO secretaries in MS Office or English level).

2.5 Who will Conduct It

1. The Training Department Team

The Training Needs Analysis is usually conducted by the Training Department at the NGO. The training team should have the required knowledge and skills to drive the process. They need to liaise with NGO management and other departments in order to gather bits and pieces of what will become the 'big picture'.

A challenge is to conduct the Training Needs Analysis with objectivity, detached emotions, and timeliness. Results must be gathered with technical skill and reported in a way that is understandable to all concerned parties.

2. In-house NGO Employees

For specific NGO projects or areas of work that require technical expertise, in-house employees can be involved and appointed as 'needs assessors'. In this case, the Training Team needs to provide specific instructions and documentation on how the process goes.

3. External Consultants

When the above is not possible because of time constraints, financial limitations, lack of skills and expertise, the use of external consultants may be considered. Consultants should train the NGO's Training Team so that the reliance on them will be temporary.

The Training Manager at the NGO with the responsibility for the selection decision should seek consultants who:

- Are familiar with the NGO
- Understand and are willing to apply the systematic approach to Training Needs Analysis
- Can demonstrate the ability to communicate easily with all NGO employee levels
- Will permit selected employees of the NGO to participate in performing assessment functions under close consultant supervision
- Can demonstrate a record of satisfactory services to other NGOs

2.6 Training Needs Analysis Flowchart

The process of conducting a Training Needs Analysis can be summarized in the following flowchart:

Management Buy-in & Communication

↓

Conduct Needs Analysis

↓

Compile & Analyze Data

↓

Identify Training & Non-Training Needs

↓

Prioritize Needs

↓

Generate TNA Report

2.6.1 Management Buy-in and Communication

A simple first step is to prepare a report/memo on Training Needs Analysis for review and circulation by the NGO management. It should contain the following information about the process:

- What a systematic Training Needs Analysis is
- Why a decision needs to be made to engage in it
- Which departments, sections and units will be taking part in the process
- When the process will begin and end
- Who is in charge of the process
- How the results will benefit the parties asked to take part

This report/memo will shed the light on the process and trigger the buy-in of the NGO management to all related activities.

Communication

As the Training Needs Analysis will involve other NGO employees, the Training Manager needs to explain the process to them, letting them know who is to be involved with the process, how it will be implemented, what effect it will have on them, and why they should give it their cooperation and support.

Keeping employees informed can help overcome possible resistance to new programs. Employees may perceive the Training Needs Analysis process as an invasion of privacy or simply more work. Negative attitudes toward the new process may be aggravated should employees feel that the system is being forced on them.

Several actions can be taken to anticipate resistance or prevent it from disrupting the successful implementation of a new program.

- Provide the facts about why Training Needs Analysis is good for the NGO
- Find out the issues or questions that are likely to arise and provide answers for them
- Invite suggestions from employees in order to gain their interest and support
- Avoid decisions which could result in employee opposition
- Don't simplify the time and work involved but explain how the new process will cause the least disruption possible
- Explain when the process will begin and how it will affect employees
- Acknowledge the efforts made by employees who are assigned analysis responsibilities
- Confirm that employees understand the process by using examples which they are certain to understand and relate to

2.6.2 Conduct Needs Analysis

Many Training Needs Analysis theories and models are available for use in different set-ups and situations.

1. Theory 1

In 1961, Thayer & McGhee suggested a plan to address Training Needs Analysis. The three levels of analysis suggested by McGhee & Thayer are:

A. Organization level
This covers the examination of the NGO objectives, the available resources, the utilization of these resources, the organizational climate (attitude towards work, absenteeism, turnover, attitude surveys, etc...) & existing measures of effectiveness.

B. Task/ Job level
This level looks at particular jobs, the components, the various operations and conditions under which it is performed, the skills, knowledge and attitude needed.

C. Individual level
This is concerned with how well a particular employee is carrying out the tasks necessary for successful performance.

2. Theory 2

Jossey-Bass/ Pfeiffer 'Training Annual'

The following section examines the 6 areas associated with Training Needs Analysis and provides guidance on how to use them through templates and samples. All enclosed forms are suggestions that you could implement according to your NGO set-up.

A. Context Analysis
B. User Analysis
C. Work Analysis
D. Content Analysis
E. Training Suitability Analysis
F. Cost-Benefit Analysis

While it's sometimes impossible to apply the six analysis types in every situation, it's up to the Training Manager to decide which tool fits best; however, applying them all will guarantee that the 'big picture' is grasped and well analyzed.

In this manual, we will base our Training Needs Analysis on the theory taken from the Jossey-Bass/ Pfeiffer 'Training Annual'

A. Context Analysis

Starting to plan properly for any development activity is like trying to do a jigsaw puzzle. In this initial analysis, the 'Context' means checking the NGO strategy and objectives, the NGO needs; the decisions makers and history of the NGO with regards to training. In case a strategic plan is not available, you can carry a SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) in order to identify which areas in the NGO require focus.

Context Analysis tackles the needs of the NGO and what you need to accomplish through training in terms of performance outputs. There will be many changes that will affect you in the future. All of them will affect the objectives and goals of the NGO and bring development needs with them.

To be effective planners, you need to be aware of what is happening, and may happen, so that you can manage the change and make the most out of it.

Context Analysis - Points to be addressed	
Strategy and Objectives	Review the existing strategy of the NGO, what is the direction, what needs to be accomplished in the coming period, what are the set objectives and how can the Training function assist in achieving these objectives. Conduct and review the SWOT analysis (Template 2.1).
External Factors	A review of all external factors that could affect the NGO (Template 2.2). They fall under 4 categories: Social, Technological, Economical, and Political (STEP).
NGO History	Review NGO history with regards to training. Are people committed to Training? What was the feedback on previous Training Needs Analysis conducted in the past? What are the preferred training methods in the NGO?
Decision Makers	Who are the decision-makers when it comes to choosing training programs, who are the sponsors and donors?
NGO Need	What is the need for the proposed training? Why do people think that there should be a training program?

Related documents

- *SWOT Analysis (Template 2.1)*
- *STEP Analysis (External Factors) (Template 2.2)*

B. User Analysis

This second type of analysis enables you to collect data about the 'Users' in order to design a training program according to their needs, preferences and abilities. The term 'User' includes both the trainees and the trainers who will be involved in the process.

User Analysis - Points to be addressed	
Demographics	Review the following factors related to users, mainly the trainees here: age, gender, education level, language, culture, background, location, number involved in the training, employment levels.
Learning Styles	What are the learning styles of trainees? Two theories and questionnaires could be applied (Templates 2.3 & 2.4). Otherwise, asking trainees how they usually prefer to learn could be applied. This enables you to choose the methods of development in your Training Plan.
Past Experience with Training	Review methodologies that worked best, those that did not work, as well as those that created resistance. Are trainees attending willingly or forced to attend a specific training?
Time	Time availability of trainees. How much time can they invest in attending training?
Prior Knowledge	Prior knowledge of the topic that will be trained.
Specific Development Needs	Taken from the annual Performance Reviews or Personal Development Plans based on the NGO competencies.
Trainers	Review who is going to train, what is their level of knowledge about the topic, how they prefer to conduct their session.
Attitude & Expectations	Of both trainees and trainers about the training. What is the feedback from any employee attitude survey?

Related documents

- *Learning Styles Inventory 1 (Honey & Mumford) (Template 2.3)*
- *Learning Styles Inventory 2 (VAK) (Template 2.4)*
- *Performance Appraisals Summary (Template 2.5)*

C. Work Analysis

'Work' Analysis is an analysis of the job and its requirements and the tasks being performed. The Work Analysis involves job and task analysis. It seeks to specify the main duties, skills, knowledge and attitudes required to perform the job. This helps ensure that the training which is developed will include relevant links to the job.

You can use the following methods to conduct a Work Analysis. Some of these methods will be further explained at a later stage.

- Direct observation of the person performing the job
- Videotape the person
- Interview with the employee or direct supervisor
- Self-assessment reports

Work Analysis - Points to be addressed	
Job Requirements	Review what is the job being performed.
Task Analysis	Breakdown the job into smaller tasks in order to provide a clearer picture of the performance.
Standard Level	Review the required standard to perform the job. Compare it to the actual performance level in order to identify the 'gap'.
Knowledge & Skills Levels	Assess the actual knowledge and skills levels in performing the job. Compare it with the required level of knowledge and skills.
Performance Gap	Analyze all identified performance gaps.

Related documents

- *Task Inventory Questionnaire (Template 2.6)*
- *Work Analysis Interview (Template 2.7)*

D. Content Analysis

'Content' Analysis is the examination of documents and procedures in order to answers questions regarding what type of knowledge or information is used on the job. This helps to establish a logical flow, groups the data into digestible parts and ensures that the level and clarity of the training content are appropriate to the needs of the users.

The draft material of the training topics that will form the 'Content' can be found in:

- An already existing training program that should be updated
- Policies or work procedure that need to be put in a training format
- A new topic that should be cascaded in terms of training

Content Analysis - Points to be addressed	
Documentation	Review all the documentation (manuals, policies, procedures, flowcharts, etc...) that is used on-the-job. Check in which format the documentation is available.
Relevance	Check the relevance of the topic to the users, mainly the trainees.

E. Training Suitability Analysis

Analysis of whether training is the desired solution. Training is often seen as a quick fix for changing individual and NGO performance but in reality the impact of training is limited to providing knowledge and skills and a space to practice and develop these skills.

Below are examples of situations where training is required (A development need exists):

- Induction of new NGO employees
- Internal promotions
- Internal transfers
- New equipment
- New legislation
- New procedures
- New standards
- New systems
- Performance management
- Skills shortages
- Succession planning

Examples of situations where Training is not required (A non-development need exists):

- Faulty equipment
- Staffing levels
- Lack of motivation
- Lack of discipline
- Recruitment and selection procedures

Training Suitability Analysis - Points to be addressed	
Non-Performance Signs	Review the signs of non-performance (non-compliance with standards, accidents, lack of motivation, turnover, etc…).
Causes	Identify the causes of non-performance. This will be further explained at a later stage.
Training Suitability	What training could fill the development gap, between the actual and desired performance.

F. Cost-Benefit Analysis

'Cost-benefit' Analysis is the estimation of the Return on Investment (ROI) of training. Effective training generates a return to the NGO that is greater than the initial investment to produce or administer the training.

Cost-Benefit Analysis - Points to be addressed	
Phases	Review the phases of the design and delivery of training.
Budget	What is the budget allocated to the training project.
Donors	Who are the donors, what is the expected amount of donations that could be allocated to the training project.
Costs	Make an estimation of the direct costs (consultants, training stationery, printing, rental of equipment, etc…) and indirect costs (Travel arrangements, accommodation, etc…).
Benchmarking	What were the bottom-line benefits of such a program.
Available Resources	Review the resources available (Training room, specific equipment, audio-visual requirements, etc…).

2.6.3 Compile and Analyze Data

1. Sources of Data

In conducting your Training Needs Analysis, you may have a variety of data sources available to you. Which data sources you use will depend on a number of factors:

- The amount of time you have available
- The human resources you have available
- The level of accuracy you require
- The reliability of each data source
- The availability/accessibility of each data source

A. Internal Data Sources (Where applicable)

- NGO Strategic Plan
- Performance Appraisal forms
- Current NGO employees (number or list of employees with their positions)
- Employee satisfaction surveys
- Health and Safety audits
- Personal Development Plans
- Personnel records
- Training records

B. External Data Sources

- Consultants
- Libraries
- Newspapers
- Professional journals
- Relevant magazines
- National Statistics
- Relevant research (papers or studies)

2. Data Collection Methods

There are several different ways in which to collect the required data for the Training Needs Analysis. You can utilize multiple methods in order to form a more realistic and accurate analysis.

This will take longer time, but if conducted properly, it will deliver more meaningful results and will lead to the development of highly relevant and targeted development activities. Below are examples of the most used methods to collect data:

A. Direct observation
B. Questionnaires
C. Consultation with key persons
D. Review of documents
E. Interviews
F. Focus groups
G. Tests

A. Direct Observation

Advantages	Disadvantages
• Observation of work as it occurs • No interruption of work activities • Can be easily scheduled	• Need for skilled observers • Difficulty getting at covert/concealed behaviour

B. Questionnaires

Advantages	Disadvantages
• Accommodate a large number of respondents at the same time • Inexpensive • Can be customized according to participants • Confidential/Anonymous • Can incorporate different types of questions	• Takes time to develop • Should be limited to a 10-minute answering time • Difficult to summarize open-ended questions • Difficulty getting to the root cause of the problem • The percentage of returned questionnaires is usually low • What participants might say and what they do could differ

C. Consultation with Key Persons

Advantages	Disadvantages
• Address directly people with the required skills or knowledge • Provides a concise and accurate data	• Difficult to choose who is best to be consulted • Feedback might be biased if the consulted person tries to impress the data collector

D. Review of Documents

Advantages	Disadvantages
• Accessibility • Easy to gather • Works without involving other people, thus taking their time	• Difficulty getting to the root cause of the problem • May require interpretation • May be difficult to obtain required documents

E. Interviews

Advantages	Disadvantages
• Direct personal information • In-depth data • Good for complex or undefined area	• Time-consuming process • Reactivity of the interviewee • Need for an expert interviewer

F. Focus Groups

Advantages	Disadvantages
• Large number of participants • Many viewpoints and information • People can build on others' ideas	• Difficult to analyze if there is a lot of data • Time off-the-job is required • Scheduling issues • Results need to be verified by observation and/or other methods

G. Tests

Advantages	Disadvantages
• Easy to quantify • Provide accurate results • Measurable • Used to benchmark	• Validity issues • Knowledge and Skills assessed might not be used on-the-job • Usually perceived negatively by participants

2.6.4 Identifying Training and Non-Training Needs

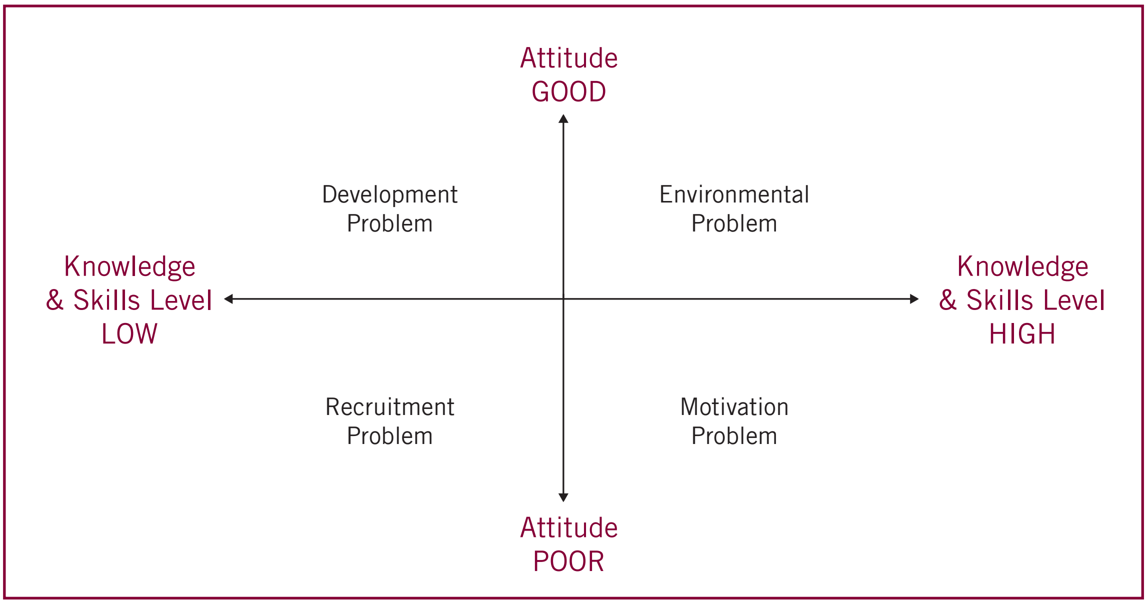
Once you have gathered all the data, you will get a large amount of information and scenarios that need to be filtered into 2 categories:

1. Development needs
2. Non-development needs

With all the output from the Training Needs Analysis, you cannot be certain that training will be the desirable solution.

To better understand development or non-development needs is to refer to the below model based on the Knowledge & Skills levels vs. the Attitude of employees.

If there are problems or issues with people's performance, this model can be helpful in determining how to approach the problem. There is only one quadrant where development is the appropriate remedy: in case of low level of Knowledge and Skills + good Attitude.



2.6.5 Prioritizing Development Needs

Now that you have completed your in-depth analysis of current and future development needs, you are ready to begin planning for how you will meet them. Before you do this, it is a good idea to assemble your list of needs in one place so that you can prioritize them.

One way to sort out all the information that you have, is to 'group' your needs according to four main categories:

Mandatory	Obligatory	Remedial	Developmental
Development that we have a legal obligation to carry out such as Fire Training and Health and Safety Training, Manual Handling, First Aid Training, etc…	Development that the NGO is obliged to do by being responsible and reputable entity/employer i.e. the induction training for all new NGO employees, job skills if applicable, etc…	Corrective Training to put things right that are going, or have gone wrong. It is usually applied when you notice a drop in the application of standards i.e. refresher training on how to use the water conserving irrigation methods, conflict resolution course, etc…	Designed to maximize the potential of the individual, and help them develop to their fullest extent - whether in the current job, or in preparation for promotion. Examples of developmental programs include: Presentation Skills & Public Speaking, Leadership for Women, etc…

Development needs will not always fall exactly into one of these categories, so do not waste time looking for an exact fit. Use the categories as a tool to help ensure that you have an even spread of activity.

By using all these tools and the information you have collected, you are now in a position to interpret all the information and arrive at a balanced view of the NGO needs, people, and your priorities.

Once you are clear on your needs, the next stage is to finalize the Training Needs Analysis reports, agree on the development objectives, and the methods of development you will use. Then you are ready to finalize and communicate your Training Plan.

2.6.6 Generate Training Needs Analysis Report

There are different forms of Training Need Analysis reports. Because of this, there is no single template that will work for all situations. However, every report will have elements in common, making it possible to start from a standard template which can then be adjusted to suit the specific situation.

The content of a Training Needs Analysis report (Template 2.8) will be unique to the circumstances which have been investigated. However, the main areas will normally consist of the following generic headings.

TNA Report – Main Headings
Cover Page
Executive summary
Introduction
Terms of reference
Methods used
Target audience
Outcomes and Findings
Conclusions & Recommendations
Bibliography
Appendices

Presentation of Training Needs Analysis Findings

Once your report is generated, it is necessary to get the NGO's management support to recognize and ensure that resources are available to address the development needs. By presenting your finding either by discussing the report or by organizing a simple presentation, you will ensure that actions are more likely to be taken rather than the report being sent and ignored.

2.7 Methodology – How to Organize your Work

Developing a Work Plan

A 'work plan' is a written description of the activities that will take place during a Training Needs Analysis. A useful plan will contain a schedule of activities in sequence with a separate sheet for each day of planned activity.

The work plan also indicates opposite each event the block of time assigned to its completion and the resources needed to carry it out. If the assessment is being conducted by two or more employees, space may be needed in the work plan to indicate who is responsible for carrying out each task.

Preparation of a work plan should start several weeks before a Training Needs Analysis is scheduled to begin. This is necessary so that employees who are assigned to do the analysis, to be interviewed or to complete survey forms have sufficient notice to include the activity in their work schedules.

Related documents

- *Training Needs Analysis Report (Template 2.8)*
- *Training Needs Analysis Work Plan (Template 2.9)*

2.8 The Training Plan

Having gathered all your information together on the needs of the NGO, presented the Training Needs Analysis findings and received the go-ahead from the NGO Management about the proposed actions, you now need to consolidate all this into the Training Plan. This is a document that represents all the development that will be carried out over a stated period of time.

There are many advantages for producing and communicating the NGO Training Plan:

- Ensures development is carried out and happens when needed
- Shows commitment from you as a Training professional
- Shows commitment from the NGO
- Sets priorities and targets for the Training Team
- Ensures that nothing is duplicated or forgotten
- Easy to monitor and coordinate
- Assists with the management of time and resources

It is recommended to produce the NGO's Training Plan bi-annually. Producing the document every six months allows you to take into account changes that happen in the NGO or with the people.

2.8.1 Who Should Be Involved

Before you write your plan, it is a good idea to discuss your ideas with NGO individuals who are going to be involved in making it happen. Some people you should consult with include:

- Members of the NGO Management Team – to ensure your planned activities are in-line with the NGO objectives and to ensure that you have allocated sufficient resources to make your plan work.
- The Training Team – who can coordinate different activities happening in different departments and share information and resources.
- Skilled Trainers in other NGO departments (if applicable) – to share the needs and gain their commitment to run training sessions.
- External Training Consultants – In case outsourced training programs are required, to agree on courses and arrangements.

2.8.2 Development Methods

Although training is probably the most popular way to develop people, there are in fact many other methods that you could use. Consider using other methods which might be quicker, easier to use and just as effective as training. Some common development methods include:

- Skills Training (On-job)
- Off-job training
- Coaching
- Observation
- Work shadowing
- Special projects/assignments
- Training tasks/activities
- Meetings/briefings
- Cross Training
- Reading relevant magazines, articles, books
- Research & study
- Videos & watching TV
- Internet/computer based training
- Lectures, conferences, seminars

The development methods you suggest are likely to be influenced by:

- Resources/budget – time it takes, how much it costs, availability of the method
- Priorities/needs of the individual
- Current skills level of the individual
- Language ability
- Learning style preference

2.8.3 What Should Be Included

The NGO's Training Plan format (enclosed) should include the following sections:

Training Plan Headings	
Area of Development	A broad statement of the area of development e.g. new equipment, English Language, supervisory skills.
Development Objective	What you plan to achieve through the development activity.
Development Method/Description	i.e. Skills training, external workshop, attending a forum.
Trainee #/Level/ Names	Numbers and levels are sufficient for general training. Use names in addition for other types of development.
Responsibility	State who will be responsible for organizing/ implementing each piece of development.
Date(s)/ Duration/ Completion Date	Insert the date, if known, how long the development activity will take and the date when the development activity will be completed, as it may be spread out over a number of weeks or months.
Review Method	State how the development activity will be reviewed to determine if the development objective was met.

2.8.4 Writing Development Objectives

Development Objectives are set by you, as the developer, and are explained to your trainees. They identify the specific changes that you expect from the trainees as a direct result of the development activity.

Writing Development Objectives is an important part of the plan because they help you to think about what you want to achieve through the development activity and they act as a basis to measure the results of the activity to see if you were successful. Remember that well worded development objectives are:

- Specific: States precisely & clearly what has to be accomplished
- Measurable: Defines quantity and quality
- Achievable: Can be achieved by the trainee and stretches their capabilities at the same time
- Relevant: to the trainees, their job and affects their performance
- Time-bound: Indicates the timeframe in which the KPO (Key Performance Objective) will be accomplished

Documents & Templates

- *SWOT Analysis (Template 2.1)*
- *STEP Analysis (External Factors) (Template 2.2)*
- *Learning Styles Inventory 1 (Honey & Mumford) (Template 2.3)*
- *Learning Styles Inventory 2 (VAK) (Template 2.4)*
- *Performance Appraisals Summary (Template 2.5)*
- *Task Inventory Questionnaire (Template 2.6)*
- *Work Analysis Interview (Template 2.7)*
- *Training Needs Analysis Report (Template 2.8)*
- *Training Needs Analysis Work Plan (Template 2.9)*
- *Training Plan Format (Template 2.10)*

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Chapter Three

Designing Training Content

Designing Training Content

3.1 Introduction

The Instructional Systems Design model (known as 'ISD') is broken into five stages: analysis, design, development, implementation, and evaluation (ADDIE). The planning phase was already developed in the previous section of the manual.

Instructional Systems Design requires expertise and some formal training to do it right. In order for you to be able to write and develop training material, you need to attend special programs such as the Craft Training Certificate (Development of On-Job training sessions) or Group Training Certificate (Development of On-Job training sessions) or any training program specialized in instructional design.

Here is an overview of the next 2 stages: design and development.

1. Design

In the Analysis activities, you have already determined which content to cover in the training course. By Designing activities, you determine how to present that content. Specifically, design involves:

- Choosing the appropriate instruments for achieving the objectives: If the performance gap results from a lack of resources or motivation, the intervention should address those issues because training will not solve the problem. This section of the manual focuses on cases where a training program is the solution.

- Structuring the content for the training course: Structuring the content involves understanding the medium used to communicate the training content, such as the classroom, the computer, or a workbook.

- Presenting the content: After determining the structure of the content, you next determine how to present it. You choose among a variety of instructional techniques.

2. Development

Development is the stage when you convert your design plans into course materials. In this section of the manual you will learn how you can develop slides, notes, and handouts for the classroom courses. During the development phase:

- You will review the content to make sure it is accurate/relevant
- You also run a pilot of the course with people who represent the intended trainees to find out which parts of the course work well and which parts need improvement
- You check for editorial issues, such as consistency in terminology

3.2 Before you Begin

You need to do two main activities before you start your design project:

1. Concept Development
2. Project Plan

1. Concept Development

Before developing the training concept into content, you need to gain the ‘buy-in’ of the NGO Management about your project. This will be in the form of a written document summarizing the design blueprint for a training program. It includes the following sections:

- Background info about the project
- Reason for design
- History of the problem to be resolved
- Purpose of the program
- Learning objectives
- Target audience
- Requirements
- Various constraints
- Language
- Suggested Modules
- Sponsorship

The Concept Development document needs to be discussed and approved by the NGO Management before engaging in the design project.

2. Project Plan

A Project Plan form should be issued to help you plan every step of the project. This form provides more the breakdown of all the activities that you will be doing. It includes:

- The key project milestones
- Who should do it
- By when it needs to be completed
- Sessions planning
- Requirements planning

Before you initiate the work on writing a new training program for either the NGO or for any project outside the NGO, you need to take into consideration that it is a time-consuming process. Below is a table of the estimated time required for each phase of instructional design:

Milestone	% of Total Project
Training Needs Analysis: Although you do not separately schedule them (you just schedule a single needs analysis), the schedule needs to leave time for performing each of these activities: Research, Interviews, Report generation of the needs analysis, Approval for the report, Write objectives, Prepare evaluation plan, Receive informal approval for the objectives and evaluation plan.	10% to 15%
Design: which includes the following activities: Choosing form and medium, Structuring content, Preparing design plans, Reviewing and revising the design plans with the sponsor and potential trainees, Preparing production guidelines (editorial, technical, production guidelines), Final approval for the project plan.	15% to 20%
First draft + Review	25%
First review by selected parties: make sure that you leave time for copying and mailing as well as time for meetings to clarify review comments.	
Second draft + Review	15%
Second review	
Third draft (optional) + Review	10%
Third review (optional)	
Final draft	5%
Production: Although not separately reported in a schedule, leave sufficient time for: Copyediting, Preparation of materials for printing, Printing.	10%
Shipping and distribution of materials (if applicable)	1 to 4 weeks

Related documents

- *Concept Development Format (Template 3.1)*
- *Project Plan Sample (Template 3.2)*

3.3 Instructional Design Stages

1. Writing the Instructional Objectives
2. Writing the session Introduction, Development and Consolidation (IDC Structure)
3. Writing an Introductory Session for the program
4. Writing the Training Manual Introduction

1. Writing Instructional Objectives

To enable both you and your trainees to know where you are going, and to realize when you get there, it is important that you set a clear, realistic and measurable training objective.

A Training Objective is a statement of the desired outcome of a training session, which clearly states what the trainees will be able to do as a result of the training. It is set by the trainer and explained to the trainees.

Instructional Objectives are written for the program as a whole and for each session of the training program.

The 3 Components of a Training Objective

A. 1st Component: It is stated in 'Performance Terms'

It states what the trainee will be able to do by the end of the training session. For this, we must use an action verb that we can measure performance with:

Examples of Action Verbs					
Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
Count	Associate	Apply	Order	Arrange	Appraise
Define	Compare	Calculate	Group	Combine	Assess
Draw	Compute	Classify	Translate	Construct	Critique
Identify	Contrast	Complete	Transform	Create	Determine
Indicate	Describe	Demonstrate	Analyze	Design	Evaluate
List	Differentiate	Employ	Detect	Develop	Grade
Name	Discuss	Examine	Explain	Formulate	Judge
Point	Distinguish	Illustrate	Infer	Generalize	Measure
Quote	Estimate	Practice	Separate	Integrate	Rank
Recognize	Extrapolate	Relate	Summarize	Organize	Rate
Recall	Interpret	Solve	Construct	Plan	Select
Recite	Interpolate	Use		Prepare	Test

Examples of Action Verbs					
Knowledge	Comprehension	Application	Analysis	Synthesis	Evaluation
Read	Predict	Utilize		Prescribe	Recommend
Record	Translate			Produce	
Repeat				Propose	
State				Specify	
Tabulate					
Trace					
Write					

B. 2nd Component: It must include the 'Standard of Performance'

The standard states clearly the level of learning that must be achieved and helps the trainer to evaluate the outcome of the learning. It is a measurement of success.

Examples of standards:

- State the four reasons…
- Identify six out of eight…
- …within fifteen minutes
- …to meet standards
- …to meet legal requirements

C. 3rd Component: It must 'Check Understanding'

The objective must test understanding as well as recall (memory).

Examples of how to check understanding

- Explain why...
- Demonstrate…

Here are some examples of well written training objectives. A complete and well-written training objective will include three components.

- *By the end of the session, trainees will be able to list the 6 types of conflict and demonstrate how to resolve conflict in a role play situation.*

- *By the end of the session, you will be able to explain at least four reasons for maintaining an up-to-date and well presented notice board.*

- *Our session objectives are that you will be able to describe five training techniques and explain the advantages and disadvantages of each.*

Tips on Writing and Presenting Objectives
Write your objective first, before preparing anything else. You can then design your training session so that it achieves your objective. Do not write your session and then think "I'd better write some objectives."
Objectives are central to your training, so it is important that your trainees hear and see them. Objectives can be presented on a PowerPoint slide, on a flipchart or in the participants' files or workbooks.
It is common to preface an objective with the words: 'By the end of this session you will be able to...' It can be repetitive to use the same words all the time. Some other ways to say the same thing are: - Our session objectives are... - In an hour's time, you'll be able to... - The planned objectives for this session are...
You can refer back to the objectives at the end of your training session and review with your trainees whether or not they have been fully achieved.
Sometimes, especially at the beginning of longer training sessions, we ask what the trainees want to get out of the session and we note down their answers. By doing this we can check if they have any specific objectives or things that they want to achieve from the session, in addition to the training objectives. As the trainer, we can then aim to incorporate those points into the session, if relevant to the group.

2. The IDC Structure (Introduction, Development, Consolidation)

The training session has three phases, with time divided as follows:

A. Introduction	15% of total time
B. Development	75% of total time
C. Consolidation	10% of total time

So, for a 30 minute training session, the approximate timings are:

A. Introduction	5 minutes
B. Development	22 minutes
C. Consolidation	3 minutes

A. Writing the Introduction (INTRO)

It would be a waste of time trying to teach trainees anything before you are sure that their minds are receptive and prepared for learning.

A training session can be effective only if it is properly introduced; the first phase of the session is called the Introduction. There is a useful mnemonic for remembering the components of the Introduction.

I	Interest
N	Need
T	Title
R	Range
O	Objective

The Interest

Gain the interest and attention of the trainees in a way that is relevant to the training session and to the trainees: For example:

- Make a surprising statement
- State an interesting statistic
- Give a quotation
- Ask questions
- Show an interesting visual
- Tell an amusing story
- Give historical or geographical background information

Avoid stating a negative interest factor that might frighten or demoralize your trainees. Aim to 'wow' your trainees, by finding an original and creative interest. You are limited only by your imagination.

The Need

Describe to the trainees a personal, work-based benefit of attending the training. Examples include:

- Makes the job more interesting
- Ensures safety
- Achievement
- Increased status
- Professionalism and job satisfaction
- Saves time, hassle, easier job,
- Enhanced team spirit
- Advancement - but only if it is true
- Proficiency
- Confidence
- Helps development of your leadership competencies

Benefits for other parties or non work-related benefits may also be mentioned, but only in addition to a clear, personal, work-based benefit.

The Title

- Give trainees a clear, creative and precise title for the session.
- It is a good idea to show the title to your trainees; either on a flipchart or slide. Illustration and color will add interest and visual impact.

The Range

Outline the range of the session. This is a 'thumbnail sketch' of what will be covered. It includes:

- An indication of the key stages/main topics
- Trainee involvement and development methods to be used, e.g. discussion, video, role play
- How long the session will last
- Whether trainees will be required to take notes

The range is usually stated, but not visually displayed.

The Objective
- State the objective of the session by telling the trainees exactly what they will be able to do by the end of the session. - The five elements of the introduction can be delivered in any order. However, all five elements must be included BEFORE the development phase of the session.

B. Designing the Development

A training session can be similar to a skeleton, which is described as a strong, flexible framework that supports the body and protects the internal organs. We might think of the Introduction as the head, the Development as the middle or spine and the Consolidation as the legs.

The spine holds the whole skeleton together, and without one our bodies would collapse. Similarly without a good ‘middle’ or development phase, where the learning takes place, our training session would collapse, or not be as effective as it could be.

The development phase of a training session cannot be planned until a clear and precise objective has been written. The development phase is developed from the objective, not vice versa.

Four Steps to Writing the Development Phase
I. Generate ideas and gather information
II. Decide on key points and prioritize information
III. Group information into logical chunks of learning
IV. Decide on appropriate development methods

I. Generating Ideas and Gathering Information

One method of generating ideas for your development phase is to brainstorm a list of topics related to your training objective.

However, our brain doesn’t work in lists, but makes associations or links between words and ideas. This is reflected in a more creative way of generating ideas, called the mind map.

If you would like to research mind maps, visit the Mind Map website:
www.buzancentres.com

You can also download a free trial of mind mapping software from:
www.mindmanager.co.uk

You can gather information for your training session from the following sources:

- Books
- Internet
- Relevant magazines
- Your manager(s) and colleagues
- Experts
- Real-life work situations

II. Deciding on key points and prioritizing information

Once you have generated your list of topics and you have gathered information you probably have far too much material for your training session, so you will need some way of organizing it. One way is to classify your material into 'MUSTS', 'SHOULDS' and 'COULDS'.

'MUSTS'	Vital information that must be given to the trainees if the objective is to be achieved.
'SHOULDS'	Important information that should be given to the trainees to help under standing of the MUSTS, and improve the level of understanding.
'COULDS'	Additional information that you could give, to enhance learning. It is not essential; however, it can be researched and used for answering specific questions and can be included in handouts as background reading.

III. Grouping Information into Logical Chunks of Learning

We group information into manageable chunks, and present it in a logical order, progressing from simple to complex. These chunks are called stages.

When staging the development phase we need to take into consideration the following factors:

- Preparing logical & balanced 'chunks' of information or learning
- Having roughly equal chunks of learning in each stage
- Level of complexity
- Level of trainees

IV. Deciding on Appropriate Development Methods

As trainers we have a wide range of different development methods available to us. The next step in the designing process is to select the best development methods to use at different points in the training session. These methods include:

- Questions and answers
- Role play
- DVD/video
- Competitions and quizzes
- Discussion
- Group and pair work, etc

Further Points to Consider when Designing the Development Phase:

- Keep it simple at the beginning and move on from there to more complex issues
- Start with known information and move to the unknown
- Don't overload trainees
- Avoid jargon
- Use visual aids to support Musts/Key points
- Learning that is 'fun' is remembered

C. Writing the Consolidation

It is important to have a structured close to the training session, in which you test the trainees and ensure that the training objectives have been achieved.

Your 'test' must relate to your session objectives. You can test your group by means of:

- Testing questions
- Questionnaire
- Observing performance
- A practical exercise
- A role play
- A quiz

You must ensure that your objective is fully met and check both recall of information and understanding of the content.

- Ask 'why' questions
- Ask 'how' questions
- Ask the trainees to 'explain' something
- Ask the trainees how they will apply the learning back in the workplace
- All trainees should be involved in the consolidation
- Do not introduce any new learning in the consolidation
- Ask questions in the same sequence as information is presented in the development phase

Related document

- Training Notes Template (Template 3.3)

3. Designing an Introductory Session

After designing all the sessions of your training program, you will need to prepare an 'Introductory session' that you will use at the opening of the training program. The session should include the following:

Introductory Session Content
Icebreaker
Personal Introductions (of both the Trainer and trainees)
Program Objectives
Program Outline
Domestics Arrangements (Explanation about expected coffee breaks & lunch, location of restrooms, fire exits, use of mobile phone, smoking, participation, asking questions, etc…)
Note use of workbooks during the training event if applicable

4. Designing the Training Manual Introduction

Sometimes, you will be designing a training program and rolling it out it yourself; other times, you may write a training program and have the delivery and implementation conducted by another trainer.

Every training manual that you will produce needs to include guidelines for trainers who will use it. The manual introduction provides the detailed explanation that each trainer requires to develop an understanding of the requirements.

In the Training Manual Introduction, you need to include information on the following:

Training Manual Introduction
Program aims
Program objectives
Program outline
Who should attend
Recommended group size
Participant preparation
Room layout and equipment requirements
Trainer session notes
Participant workbooks and handouts

Training Manual Introduction
Support materials
Delivery guidelines
Module timings
Trainer Preparation
Module evaluation sheets
Participant invitation
Workplace assessment & certification guidelines

3.4 Invitation Letters

The invitation letters, also known as 'Joining Instructions' should be included in the Training Manual. The content of the invitation letter will vary depending on each training program. Some of them will be lengthy others will be more concise. Generally, an invitation letter will help you promote the training event and send a professional image of your work as trainer in the NGO.

The content of the invitation letter will include the following:

Invitation Letter Content
Date of sending the letter
Recipient (the trainee's name in this case)
Training Program Title + Objective + Outline
Training Date
Training Venue + Map of location if required
Start and end time
Trainer's name + Contact details
Required preparation if required
Dress code, depending on the training event
Details of workshop/training event charges if applicable

3.5 Handouts

When writing materials to support a learning event there are some basic principles that must be followed:

- Advise participants that there will be handouts
- Space out key points so that it is easy for eyes to recognize them
- Mix your script with diagrams to break up the text
- List any further sources of information the trainee could go to
- Highlight or box any headings
- Do not write too much information on any one sheet of paper
- Do not just use the information given in your training, you can expand on it
- Do not use abbreviations or jargon in your support material if your trainees are not already familiar with it

3.6 Learning Aids

A learning aid is a physical object or device that supports learning and appeals to the trainees' multiple senses. Learning aids will greatly enhance learning. They can be used throughout the training session and have a number of benefits:

- Provide variety and interest
- Reinforce key points
- Use the senses
- Aid memory
- Allow thinking time for the trainee

Types of learning aids: Flipchart, White Board, Posters, Graphs, Charts, Pictures, PowerPoint Slides, Handouts, Worksheets, Video/DVD, Pocket cards, Props, Models, etc…

3.7 Designing Visual Aids

This section of the manual explains how to design visible, legible, and clear visuals for a classroom course.

- Visible means that trainees can see the letters and images on the slide in the back row of the classroom in which the visuals are used
- Legible means that the images on the slide are easily deciphered by trainees
- Clear means that trainees can decipher the message on the first read-through

General Guidelines for Visual Aids Design

- Limit the amount of text on a slide
- Limit the total number of words to 35 (including the heading)
- Limit the number of bullet points to five
- Limit the number of words for each bullet point to seven
- When using bulleted or numbered lists, make sure that you have at least two items
- When presenting bullet points, use parallel grammatical construction (A parallel grammatical construction is one in which each bullet point begins with the same type of word (verb or noun)
- For headings, capitalize the first letter of each word except articles (such words as a, an, and the) and prepositions (such words as of, by, and to)
- Capitalize the first letter of the first word of each bullet point. Do not capitalize other words except for proper names. Proper names include the full names of organizations, the names of countries and people, and the proper names of departments and products
- Do not capitalize generic department names, such as sales and engineering or the generic names of products, such as computers and pharmaceuticals
- Limit the Number of Type Fonts on a Slide. Use at most two fonts-one for the headings, the other for body type (bullet points). (Of course, you can use just one font for both headings and body type)
- Use a Legible Type Size. Another consideration is the size of the type. For slides there are different recommended guidelines:

  - For headings, use 40- to 48-point type
  - For bullets, use 32- to 40-point type
  - For captions and callouts, use 24- to 32-point type

- Watch out for overuse of animation; it can quickly become distracting or annoying.
- Appropriately use emphasis type attributes:

Using Special 'Emphasis Type Attributes'	
Bold	Bold type is used for headings, broadly defined here to include headings on charts and tables. It may also be used for captions.
Italic	Italicized text denotes titles of published works (books, videos, CDs, software) (such as *The 7 Habits of Highly Effective People*). Italics are also used for words that are appropriated from other languages and have not become standard English (such as *détente*).
Underscore	Do not use underscoring, which has come to signify hyperlinks in text.

Using Special ‘Emphasis Type Attributes’	
Color	For slides, use light colors for type. In printed text and overhead transparencies, use black type. Avoid blue for type because blue is used in conjunction with underscoring to indicate hyperlinks.
ALL CAPS	Avoid using all caps except for acronyms and abbreviations. This approach to emphasizing text fails on two levels: 1) trainees have more difficulty reading text that is all uppercase than they do with mixed-case letters because trainees have a difficult time distinguishing among the capital letters. 2) Trainees usually perceive all capitalized type as being yelled at.

- Appropriately use emphasis type attributes:

Using the Right Contrast		
Type	Text	Background
Slides	Light (ideally white or cream-colored).	Slides use a dark background (ideally dark blue, charcoal gray or dark brown) because they are intended to be used in a partially lit room.
Transparencies	Dark (ideally black) (creates the best contrast with a light background).	Transparencies use a light background (ideally clear, which will project as white) because they are intended to be used in a fully lit room.

3.8 Translation of Training Material

Sometimes, your Training Needs Analysis will identify a group of target audience with limited proficiency in English. Therefore, you will be required to translate the training material that you will produce for a specific program.

- The translation can be made in-house in the NGO by the training team, or outsourced.
- The incurred time and fees for the translation need to be added to the project plan.

3.9 Formative Evaluation

To make sure your training program is understandable and functional; you need to organize and conduct 3 types of formative evaluations. In this section, we will only discuss what you will be doing the most: a pilot test.

Formative Evaluation
1. Pilot program, in which you conduct the training program for the first time with people who represent the intended trainees for the purpose of assessing which parts work and which ones need improvement.
2. Technical reviews, in which you verify the accuracy of the content.
3. Production reviews, in which editors assess the completeness and style of the content, and production specialists make sure that the printed and projected output matches that which appears on the computer screen.

3.9.1 Pilot Program

A pilot program is one in which you take the training program for a trial run and conduct it for the first time to assess which parts work and which ones need improvement.

- Generally, you need to conduct a pilot program with the second draft of the materials
- Participants in the pilot represent the intended trainees (in terms of level)
- When you identify areas where the training program needs improvement, you try to pinpoint the specific improvements that you need to make
- Because the training program has not been proven yet to be effective, you do not use the pilot results to assess the success of trainees
- You might find errors in the teaching sequence or in the wording of test questions, which limit the ability of trainees to pass the course

Following is a suggested procedure for pilot programs; however, you may want to amend it depending on your work at the NGO:

1. Reserve a room for the pilot program. Before doing so, make sure that the room has the audiovisual setup to meet your needs and can accommodate the number of trainees needed.
2. Recruit between 8 and 15 trainees to participate in the pilot program. If you recruit fewer, you might not receive a sufficiently broad perspective on the course. If you recruit more, you might not be able to debrief each trainee and receive their comments. Trainees should represent the demographics of the intended trainees, and they should be supportive of the course.
3. Between 2 and 5 working days before the program is scheduled, send a reminder to all of the participants.

4. Print and copy the training materials, including copies notes and slides.
5. At the beginning of the session, remind trainees that this is a pilot program and that it is a test of the training program, not them. They should flag any problems and make relevant comments on the materials. Let the trainees know that you will request feedback from them.
6. At appropriate intervals, stop the learning and ask for feedback. This is called a 'debriefing'. Others like to debrief at the end of each day, to avoid interrupting the flow of the class.
7. At the end, conduct a final debriefing that considers the entire training program, not just a single session. At this debriefing, ask trainees for overall impressions about the parts of the training program that were effective and the parts that could be changed.
8. Encourage trainees to provide specific suggestions on ways to fix the problems they identified - the more specific their feedback, the better you can address their concerns.
9. Assess trainees' performance on tests and other assessments to make sure that questions really address the objectives that trainees understand the test questions, and that trainees have been taught the material so they have an opportunity to answer correctly.

After completing the pilot program, review your notes. Categorize proposed comments as:

- Showstoppers - design and development should not continue before you address these issues
- Must change - although design and development can continue, you must address these issues before making the training program generally available
- Nice to change - comments that you will address if your time permits

3.10 Basics of the Production Process

Production - the process of preparing course materials for duplication - and related printing are relatively simple processes but involve numerous details. Missing a detail can cause significant problems, including delays in completing development of the training program.

The actual process of production involves converting the drafts of the various elements you have developed into pieces that can be combined into a master copy, then duplicating it.

Production Phases
A. Copyediting text
B. Producing graphics
C. Combining the text and graphics into a single file
D. Making a backup copy of the master and storing it in a safe place
E. Sending the master copy to print
F. Assembling a complete course package

1. Copyediting: is the process of marking text for final typesetting. The copyeditor looks for errors with grammar and style, raises possible legal issues, and makes sure that the production staff has adequate instructions for producing a communication product.

2. Producing graphics: In some cases, you can hire a graphic artist to take a basic image and add or remove features from it. In other cases, you might scan a picture into the computer from another source, such as from a book or photograph and, using special graphics software like Adobe Photoshop, add and remove features and crop it. Or, you might use a combination of these.

   Furthermore, if you intend to include people in your photographs, you need to consider such issues as hiring and preparing models and using model release forms (providing you with legal permission to use their images in your training program).

3. Combining text and graphics into a single file: Adding the title page, copyright notice, evaluation forms, front and back covers, and other elements to the master copy of the course materials, checking and correcting any pagination problems, and generating the table of contents.

4. Making a backup of the Master copy: Store the master in a safe place. In this backup copy, include both the source file and a printout. If anything should happen to the master copy, you have a duplicate.

5. Sending the Master copy to the printer: Your printer might require that you provide additional information and mark-up.

6. Assembling a complete course package: After receiving the printed copies from the printer, assemble a package that includes a copy of the visuals (on CD or DVD if the instructor uses slides, printed on transparencies if the instructor uses an overhead projector, the workbook, handouts, and trainer's notes). Give this package to the administrators who will support the course and the trainer who will roll it out.

3.11 Dealing with Project Changes

Using Special 'Emphasis Type Attributes'	
Who has Initiated the Change?	**How to Handle the Change**
Sponsor	Inform the sponsor that the changes are outside the scope of the project and that you will be happy to make the change, but you'll need to renegotiate the schedule and the budget. Once you have made the commitment to incorporate the requested change and determined how the schedule and budget might be adjusted to accommodate it, formally document the change in a memo and report it in the status report so that all involved with the project are informed.
You	Consider the following: • The impact on the rest of the course in terms of other changes that may be necessary (a cascading effect, such as a change in terminology that must be corrected in every session of the course) and how much time may be needed to make changes to those parts • The time required to do the change • The resources needed to produce the change. If additional graphics work is needed, for example, consider whether the graphic artist has time to produce the requested visual • The ultimate benefit to the trainee • The ultimate benefit to the sponsor. If the ultimate benefit is low, then the change might not be appropriate If, after considering these issues, you still feel that the change is appropriate, request the sponsor's support before actually making the change.

3.12 Instructional Techniques

When designing your training material, you need to choose among a number of instructional techniques in order to match your trainees' learning styles and add variety to your event.

1. Group Discussion
2. Brainstorming
3. Role-play
4. Case Study
5. Simulation
6. Gallery Technique
7. Icebreakers & Energizers

1. Group Discussion

Group discussion is a technique in which the participants are divided into groups to discuss certain issues or topics. They share their opinions and experiences while discussing the topic within a given time frame. Some group discussion techniques, such as case study, role-play and the gallery technique, require advance preparation (e.g., printed materials or display board). Discussion methods are very useful:

- For developing logical reasoning
- For analyzing problems, finding causes and defining strategies
- For learning about or better understanding the previous knowledge
- For sharing experiences of the participants
- For improving people's ability to express themselves
- For learning to respect and tolerate the opinions of others
- For developing the analytical skills of the participants
- In areas where group dynamics and the perspectives of the participants are required

Strengths	Limitations
• Participants can exchange opinions and experiences • Participants can compare their experiences with those of others • Shared experiences make it easier to identify or solve problems • Many new ideas based on those of others can be generated within a short time • Everyone gets a chance to express themselves • Discussion occurs in a systematic manner • A clear picture of the area under discussion emerges through debate • Friendly relationships spread across the group • A team spirit helps participants to increase their self confidence • Participants become more tolerant of other people's opinions	• It may take a long time to reach a consensus • Conflict or clashes may arise • The discussion may shift to irrelevant matters • Extra rooms may be required • If the trainers, facilitator or participants are not prepared, the discussion may turn out to be fruitless • Some participants may find an excuse for not taking part in the discussion • Some members may dominate others or monopolize the discussion

There are different kinds of group discussion methods, such as brainstorming, large group discussion, small group discussion, pair discussion, stations, role play, case study, simulation, the gallery technique, and question and answer. Several of these techniques will be illustrated and described below.

Pair Discussion

- Divide the participants into pairs
- Explain the topic and allocate time (the amount depends on the content or issues)
- Ask the members to sit beside each other and work in pairs
- Move around the groups and encourage sharing and discussion
- Add new points and ideas for discussion
- After discussion in pairs, have each pair contribute one point until all the groups have finished
- At the end, discuss the key points identified by the pairs

2. Brainstorming

Brainstorming is a group creativity technique designed to generate a large number of ideas for the solution of a problem. The method was first popularized in the late 1930s by Alex Faickney Osborn in a book entitled 'Applied Imagination'. Osborn proposed that groups could double their creative output with brainstorming.

There are four basic rules in brainstorming. These are intended to reduce social inhibitions among group members, stimulate idea generation, and increase overall creativity of the group.

Focus on quantity: This rule is a means of enhancing divergent production. The assumption is that the greater the number of ideas generated, the greater the chance of producing a radical and effective solution.

Withhold criticism: In brainstorming, criticism of ideas generated should be put 'on hold'. Instead, participants should focus on extending or adding to ideas, reserving criticism for a later 'critical stage' of the process. By suspending judgment, participants will feel free to generate unusual ideas.

Welcome unusual ideas: To get a good and long list of ideas, unusual ideas are welcomed. These new ways of thinking may provide better solutions.

Combine and improve ideas: Good ideas may be combined to form a single better idea.

How to use Brainstorming?

- Ask participants to sit in a circle or in a "U" shape
- Nominate a recorder who records the discussion points
- Have the recorder sit near the board or flip chart, ready to write down the ideas given by the participants
- Appoint a team leader to facilitate the discussion
- Describe for participants the problem or issue for discussion
- Have the recorder write down the problem or issue in bold letters on the board/flipchart
- Ask the participants to express their opinions freely on the issue, stating whatever comes to their mind immediately. Allow no criticism, debate or consultation among participants
- Encourage all participants to express their ideas or opinions quickly
- List participant points on the board/flip chart
- Allow no discussion, comment or criticism until all participants have exhausted their ideas
- Once all ideas have been presented and recorded, verify and prioritize these ideas if necessary

Strengths	Limitations
• It takes little time • More ideas are generated • Everyone becomes interested in the discussion and can participate • There is a greater opportunity to exchange views • The session can be kept lively • It motivates participants to think • It gives the facilitator some idea about the experiences of the group	• If there are many ideas, the recorder needs a lot of time to write them down • There is the possibility of inconsistent ideas being generated if the participants don't have any prior exposure to the subject • Some ideas may be vague because of the lack of analysis • At times this method may lead to disorder or chaos • A big chalkboard or a large amount of poster paper is required • The recorder has to write very fast and has no opportunity to express his/her ideas

3. Role-play

Role Play is a structured activity, usually in the form of a dramatic performance that recreates a situation from real life. The participants in a training program take part in the role-play and act out a situation for the purpose of further analysis and discussion. Through role-play we can analyze a problem and identify its causes and solutions.

To reduce preparation time and avoid observer boredom, a role-play exercise should not be too long. The "script" or scenario should be prepared with a clear focus on the selected topic or theme.

How to Use Role Play?

Prior to Role Play	During Role Play	After Role Play
• Select the topic or theme • Identify the key points to be depicted • Identify the roles to be played in light of these key points • Prepare role-play conversations for the performers; develop materials, if required	• Select performers and observers among the participants • Provide role-play conversations to all the performers and obtain their reactions, comments & suggestions • Ask performers to prepare for the performance • Ask the observers (other participants) to observe the role-play for the purpose of taking part in the discussion afterward • Introduce the participants to the role-play exercise and its purpose	• Ask performers to express their opinions regarding the performance • Ask open- ended questions based on the theme of the performance and encourage discussion • Summarize the findings of the discussion Examples of Questions to be asked after role-play: - *Did anyone else feel the same way?* - *How did you feel when…?* - *Did anyone feel differently?* - *Do you agree / disagree with them? Why?* - *What did you notice about..?* - *How do you feel about the experience?*

Strengths	Limitations
• Helps to change people's attitudes • Enables people to see the consequences of their actions on others • Provides an opportunity for trainees to see how others might feel/behave in a given situation • Provides a safe environment in which participants can explore problems they may feel uncomfortable about discussing in real life • Enables trainees to explore alternative approaches to dealing with situations • Is Stimulating and Fun	• Preparation takes considerable time • If the role-play is not executed properly, there is the risk of a negative impact • If the representation is not successful, some may find it ridiculous or childish • Highly sensitive people may find it offensive if the roles are too similar to their actual characters

4. Case Study

A case study is a detailed description of events that either really happened or are products of the imagination. Its purpose is to take the participants closer to the real context of a situation or problem. Through a case study we can analyze a problem to identify its causes and solutions based on the experiences of the participants. Case studies can also draw comparisons between ideal and real-life conditions. They can be presented orally, in written form or on film.

Case studies can be used for different purposes:

- To increase awareness of a problem
- To exchange experiences
- To reach decisions by studying a situation or an incident
- To learn from past successes and failures
- To clarify perception of the problem and the solution or results

How to Use Case Study?

Prior to the training	During Case Study Presentation	After the Case Study
• Select the topic or theme • Prepare questions or instructions to help participants investigate and understand important aspects • Decide upon the type of case and presentation • Prepare the case study with reference to participants' own experiences if possible	• Give the case study to small groups or individuals for analysis • Provide necessary assistance to guide the analysis in the proper direction • Ask participants to write down their findings on a chart	• Ask each group or individual to state their findings • After listening to the views of one group/ individual, let another present theirs • Lead the discussion in terms of the learning objectives of the training session

Strengths	Limitations
• Participants improve in their ability to analyze • The case study is a simple way to get a proper understanding of a situation and find the solutions to its problems • It creates enthusiasm and interest among the participants • It gives them a wider opportunity to share experiences • It brings real life into the classroom • Versatile knowledge can be obtained from a single situation	• Selecting a useful case can be difficult and time-consuming • The wrong case can lead to wrong impressions in the minds of the participants • The facilitator needs considerable skill in order to use this method • If the participants feel that the case is not a real one, their enthusiasm may diminish

Further, there are several issues that one has to bear in mind when deciding to use a case study such as:

A. The case must by closely related to the trainees' experience
B. Problems are often complex and multi-faceted
C. There is not always just one right solution
D. This technique requires a lot of planning time if you need to write the case yourself
E. Discussion questions need to be carefully designed

5. Simulation

A simulation is an enactment of a real-life situation. It allows participants to experience decision-making in "real" situations without worrying about the consequences of their decisions. Thus it is a way to apply knowledge, develop skills, and examine attitudes in the context of an everyday situation.

How to use Simulation?

A. Prepare the participants to take on specific roles during the simulation
B. Introduce the goals, rules, and time frame for the simulation
C. Facilitate the simulation
D. Ask the participants about their reactions to the simulation
E. Ask the participants what they have learned from the simulation and develop principles
F. Ask the participants how the simulation relates to their own lives
G. Summarize

Strengths	Limitations
• Practical • Participants are able to discover and react on their own • High involvement of the participant • Immediate feedback	• Time-consuming • The facilitator must be well-prepared, especially with logistics • A simulation is often a simplistic view of reality

6. Gallery Technique

In the gallery technique participants are divided into three or four groups to discuss issues related to certain topics. Each issue table is provided with a big board with chart paper attached (the "gallery"). Participants in each group discuss an issue and write down their conclusions on the chart paper before moving on to the other issue tables.

Each group receives a different color of pen to identify its contributions to the charts. After writing down their comments on each issue, the participants tour all of the galleries to see what the other groups have contributed.

How to implement the Gallery Technique?

- Divide participants into 3-4 groups
- Select one rapporteur in each group to document the discussion on the chart paper
- After the discussion, have the rapporteur write down the main points on the chart
- Ask each group to use one particular color of pen for recording their comments on each chart to distinguish their contributions from the others
- After rapporteurs have written down the main points on their charts, have each group move on to the other groups' sites to contribute their inputs to the respective charts
- Have all groups return to their original positions to compile the inputs of the different groups and prepare the board as a gallery for the presentation of group findings
- At the end request all participants to visit all of the galleries to read and learn about the findings of the other groups

Strengths	Limitations
• Participants can exchange their opinions and experiences with more people • Participants can confirm the value of their own experiences with a large number of people	• It may take a long time to finish the activity • Big rooms are required

7. Icebreakers & Energizers

Icebreakers are used at the start of a day, workshop or meeting of a group in order to create an active learning environment and to make the introductions.

Energizers are the activities used during a training event to enhance learning and to raise energy levels.

The choice of Icebreakers and Energizers will depend of the group level, their number, the cultural mix and the available space you have inside or outside the training venue.

How to use Icebreakers & Energizers?

- Knowing what they are is the first step to using effective icebreakers. All icebreakers are energizers but not all energizers are icebreakers.
- Choose the icebreaker to meet your needs. One of the pitfalls we can fall into is to stick to an icebreaker we know and love rather than picking ones which are most appropriate for the event, environment and atmosphere we need.
- Sometimes it may not be necessary to use an icebreaker – think it through – if the room itself can create the atmosphere needed then cut the icebreaker. Don't run them because we have a space in the notes.
- Change your icebreakers & energizers regularly – this will ensure that you think through why you are using particular exercises.

- Jargon. Be careful not to use the words ‘icebreaker or energizer’ when you introduce the exercise - this is a sure ‘turn off’ for your trainees as it is seen as jargon and probably placed in the workshop because we have to, not for a particular reason. Just say activity, exercise, or just so that people know who else is in the room – tell/sell them the benefit of the activity.
- Adapt written instructions to ensure success. Run the activities the way they are planned in order not to miss the purpose or time.

Related documents:

- Icebreakers & Energizers Samples (Templates 3.4 to 3.13)

Documents & Templates

- Concept Development Format (Template 3.1)
- Project Plan Sample (Template 3.2)
- Training Notes Template (Template 3.3)
- Icebreakers & Energizers Samples (Templates 3.4 to 3.12)

Chapter Four

Implementing the Training

Implementing the Training

The ISD model is broken into five stages: analysis, design, development, implementation, and evaluation (ADDIE). You are now in the implementation phase:

- It involves conducting the training program and maintaining ongoing support, such as scheduling the sessions, the trainees, the trainers, the training session, and equipment and making sure that the learning takes place as planned

- It involves marketing the training activities by publishing a program portfolio and regularly sending out targeted email messages in order to keep awareness high

- It also means maintaining the program: making changes to the content and the resources as appropriate and updating the content as changes to work processes, technology, and other issues arise

4.1 Train-the-Trainer

Before implementing a new Training program, you will need sometimes to organize what we call a 'Train-The-Trainer' session. It is when trainers are being trained on how to rollout the same training program themselves.

In these cases, you are normally given a trainer's guide and trained on the content of the specific new program. If it is part of a much bigger rollout program, normally, you will not be allowed to run the program until you have been trained and had practice runs at delivering the material.

4.2 Organizing Venues

In addition to designing training to appeal to learning preferences, you should give consideration to the actual learning area or training room which greatly impacts the quality of learning.

First, identify what you require in terms of the venue, which will vary depending on your training event. If it is an internal program, you may have to use in-house NGO facilities. Sometimes, you may want to use off-site facilities.

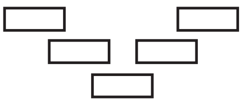
Although time-consuming, finding the right venue is a very important consideration of any event, but is particularly important when running forum, panel discussion, or a conference, because of the additional requirements in terms of numbers attending or the facilities required.

4.2.1 Selecting the Training Area

- Check that the room is big enough for the group
- Check where the nearest fire exit is (where applicable) and rest rooms are
- Check that the lighting is good for taking notes. Ensure that there is no flickering lights. Avoid glare and shadows on visual aids. Check how to adjust the lights. Natural daylight is best
- Check the temperature. Make sure the room is not too hot or cold. Check how to adjust the temperature. Remember that you will be moving around more than your participants
- Check for distracting sounds. Plan your training away from construction, maintenance work, heavy foot or road traffic. Check that there are no humming or buzzing lights, or rattling projectors. Instruct people to turn off their mobiles. Make sure you can be heard from all parts of the room

Ask Yourself
Is it large enough, and well ventilated with natural light?
Is the seating comfortable, with a facility for the trainees to write on?
Are there syndicate rooms nearby?
Are there toilets nearby?
Is there a business center, or somewhere where you can photocopy or send and receive faxes?
Are there any likely planned disturbances, e.g. refurbishment, decorating or rebuilding?
Are other large events being organized at the same time at the venue? (Sometimes small events can be overwhelmed by other large conferences)

4.2.2 Seating Arrangements

Style	Advantages	Disadvantages	Good to use for...
U Shape U	• Promotes interaction • Good visibility between participants	• Not suitable for large groups	• Group training – up to sixteen participants
Circle O	• No hierarchy – everyone is equal • Good visibility for everyone	• No leader – discussion may get out of hand	• Group discussion and brainstorming for up to twelve people
Block 	• More formal • Space for note-taking • Clear leader/ trainer at the head of the table	• Difficult to break out into groups • Poor communication/visibility between participants • Better for team meetings	• Training session for up to twelve people
Rows - Theatre 	• Accommodates large numbers • Same message to a large group	• No interaction between participants • Can people at the back see and hear?	• Giving information to large numbers e.g. First Aid
Classroom 	• Participants have plenty of personal work space • Formal – good for control	• Reminds participants of being back at school • Prevents interaction between trainees	• Training that involves a lot of writing or drawing e.g. technical design

4.2.3 Organizing the Equipment

- Set up chairs and tables for clear visibility anywhere in the room. Remove surplus seating for more effective interaction
- Create other comfortable seating areas if possible
- Check that the equipment works. Plan for a back up if there is a problem
- Check that you have enough materials e.g. paper, pens, handouts, name cards, etc…

4.2.4 Providing Food & Beverage

- Provide mineral water and candies as a minimum. If budget allows, you can request a more elaborate coffee break including mini pastries, coffee, tea or juices
- If lunch is included, avoid heavy meals e.g. pastas or any type of carbohydrates

Ask yourself
How are the refreshments organized?
Will coffee/tea be available in the room?
Can it be available all day if required?
Is there a separate facility for buffet lunch?
Can you have part of the dining room kept separate for your group?
What additional refreshments are available: mineral water, juice, mints, biscuits, cakes, fruit, etc?
How is the cost of these items calculated? What's included in the rate, what is additional?

4.2.5 Creating a Welcoming Environment

- Use color – color paper for handouts, your clothing – pale colors are best, on the walls, posters, art and decorations, flipcharts, flowers, etc…
- Play music – when trainees arrive, during breaks and during activities. 120-160 beats a minute pumps people up and stimulates the brain. 60 beats a minute (heart rate) is good for brainstorming, discussions, problem solving, writing etc…

4.3 Administration Planning

It involves
1. Scheduling training sessions
2. Enrolling trainees and confirming their registration
3. Preparing for training sessions
4. Conducting the training
5. Closing a training session
6. Complete follow-up activities

1. Scheduling Training Sessions

- Schedule the training sessions in a location that is convenient for the majority of trainees, in case that the training is not conducted inside the NGO.
- Avoid scheduling training near holidays. Generally, training scheduled the same weeks as national holidays tend to draw poorly. Even when attendance is required, trainees' attention might be on vacation.
- If one NGO employee is asked to attend a training on his/her day off, a lieu day should be given to compensate.
- Also, try to avoid scheduling training on religious and cultural holidays, even if they affect a relatively small number of your trainees. Scheduling on these dates creates an unnecessary dilemma for some trainees and may be interpreted as insensitivity.

2. Enrolling Trainees and Confirming Registration

- Enrollment is an activity in which participants reserve seats for a course. After a trainee enrolls in a course, the training team often sends a confirmation to the trainee and, just before training takes place (up to a week in advance), the training team sends a reminder that the trainee is scheduled to attend the course.
- Both the confirmation and reminder letters state the name of the training session, the date and time of the class, and the name of the instructor. The confirmation also reminds the trainee about charges (if any) and provides the name of an administrator to contact with questions.

Below is a sample of a confirmation letter:

Dear Zeid,

This is a note to confirm your enrollment in the Performance Appraisal Skills Program
The course is scheduled:

- *Monday, November 17 through Friday, November 21*
- *9:00 am to 5:00 pm*
- *Venue: Training room*
- *Trainer: Ola Sami*

Thank you for your enrollment. We look forward to seeing you there.

Best regards,

Dima Mesmar
Training Coordinator

- Make sure that the enrollment process is easy to complete. The easier a time that trainees have enrolling in class/workshop sessions, the more likely they are to register. Easy enrollment involves clear instructions, appropriate documentation, quick processing of the request, and courteous handling of registration.
- Make sure that the trainees have prerequisite knowledge when enrolling for courses.
- Make sure that the trainees receive all pre-course assignments if applicable, such as work that they should complete before class (called pre-work), and a list of equipment they might need to bring if applicable.

3. Preparing for Training Sessions

- Prepare general supplies, such as markers for the white boards, paper for flip charts, name tags for trainees, blank pads and pens, any appropriate general information about the facility (emergency numbers, locations of restrooms, information about lunch facilities, and so forth), evaluation forms and coffee break set up, etc…
- Prepare trainee's materials such as the attendance recording sheet, workbook and handouts.
- Prepare materials for exercises, by having a sufficient quantity for all trainees.
- Prepare audiovisual supplies, such as an overhead or slide projector; video, CD, or DVD players.
- Prepare room setup, which usually refers to the arrangement of tables and chairs.

4. Conducting the Training

- Be natural.
- Show your enthusiasm and commitment to the topic. Use a positive and interesting tone of voice and facial expressions.
- Speak clearly.
- Watch the trainees' reaction.
- Take every opportunity to give a positive reaction – praise, encourage and coach the trainees.
- Stand firm, don't walk up and down, or rock back and forth.
- Control mannerisms (jangling coins, playing with a paper clip, saying "er" or "you know").
- Maintain eye contact with everyone in the group. 'Sweep' the group like a lighthouse.
- Smile, but not too much.
- Use humor, but don't make inappropriate jokes.

5. Closing a Training Program

- Providing certificates to trainees who complete the program (optional at the NGO, but a popular means of recognizing trainees for completing training courses).
- Re-arrange the training venue for upcoming events.
- Collecting evaluations forms.
- Collect any flipchart that you might find useful for your post-course report.

6. Completing Post-training Activities

- Making a summary of the training evaluations.
- Providing a report of the sessions completion.
- Entering the attendance sheet in the training database.
- Discuss any concerns with the related managers or parties.

4.4 Facilitation Overview

The facilitating of groups is a fundamental management skill needed by professionals in various fields. Facilitators act as agents for change who have the ability and commitment to help individuals and groups improve their performance and achieve organizational goals. Facilitators do this by encouraging free expression and personal involvement in planning and deciding matters.

4.4.1 Definition of Facilitation

A process in which a person who is acceptable to all members of the group, who is neutral, and who has no decision-making authority, intervenes to help the group improve the way it identifies and solves problems and makes decisions, in order to increase the group's effectiveness.

Facilitator's do not:

- Contribute to content
- Decide that one person's ideas are better than another
- Let the group go off course
- Allow individuals to come under attack
- Let only a few members speak at the expense of the group
- Allow the group to find solutions that are agreeable only to a minority

Facilitation includes creating and managing an environment that makes learning easy. In his book The Skilled Facilitator, Roger Schwarz (1994) suggests that the facilitator's role is to help groups and individuals improve through "valid information, free and informed choice, and internal commitment to the choices."

Schwarz suggests that a fundamental characteristic of the facilitator is to invite the trainee into a learning opportunity in which the trainee has maximum choice as to whether and how he or she will learn. With these conditions of information and choice, when the trainee decides to learn, it is with an internal commitment that will help sustain the application of learning back on the job.

On a continuum scale, true facilitation and structured training fall at opposite ends. Some of the key differences between structured training and facilitation include the following:

Trainers	Facilitators
• Trainers train participants in new skills, knowledge and abilities • Trainers set objectives based on learning needs • Trainers design content based on analysis • Trainers lead and guide • Trainers tell groups how to do exercises	• Facilitators meet participants to discuss an agenda set by the participants • Facilitators follow the objectives set by the group • Facilitators have no input into the content • Facilitators make it easier • Facilitators assist groups in finding appropriate solutions

These differences might suggest that facilitation has little part to play in the delivery of a training program with pre-planned content. However, the term 'facilitative training' has become popular in recent years and refers mainly to the delivery style or approach.

Facilitative training is an approach that is less instructive than structured training, yet still maintains a structure and/or an agenda set by program requirements. It is seen as a suitable approach for delivering corporate training programs to senior managers, who by nature of their roles, can draw on and share a wide range of work/life experience with colleagues.

In facilitative training, it is important to adapt your style to the needs of the group. Your style should depend on the stage of maturity of the group. The more mature the group, the less direction it will need from the facilitator.

For example:

If you are facilitating a mature group and your natural style is one of direction, you should learn to listen more and speak less. Your interventions should be at the request of the group.

If your natural style is to make suggestions and you are facilitating a less mature group, you may find that the group needs more direction from you than you would normally make. In this case be prepared to take more of a lead.

The co-operative style involves asking questions and making proposals. If this is your style, you may find that you need to adapt this to be more directive with immature groups and more suggestive with mature groups.

In every group, there are three dimensions of which the facilitator needs to be aware:

- Content – the content of the meeting/the task in hand. This includes the content of what is said – opinions and views as well as what the group is working on.

- Method – how the group is organizing itself to achieve the task – the techniques used to give structure to events – for example, group discussion, work in pairs, brainstorming and so on.

- Process – what's happening while the group is working together – the unspoken and often unnoticed aspects of group behavior such as over all climate and atmosphere, hidden agendas, inclusion and exclusion, often indicated by non–verbal behavior.

Content is often the tip of the iceberg, the area on which inexperienced facilitators may tend to focus. Methods used by the group are also visible to the facilitator, whereas group processes are often below the waterline and more easily noticed by someone outside the group.

The dimensions on which the experienced facilitator normaly focuses:

Team Maturity	Facilitation Style	Group Dimension
1. Immature group	Direct	Content (if asked), Method and Process
2. Semi – mature group	Co-operate	Method and Process
3. Mature group	Suggest	Process

In practice, because most facilitators work with semi-mature groups, the amount of input into each dimension usually works out as:

- Content: 0-10%
- Method: 60-70%
- Process: 20-30%

An effective facilitator will have a compendium of methods – the techniques a group can use to structure how they work together – to help the group achieve its task.

4.4.2 Groups

Facilitators, especially in their roles as process observers, need to understand the various stages of development that every group goes through. This is because they must be able to monitor and influence the development of a group so that the most suitable options for growth can be made available at any given stage. Furthermore, facilitators must be able to anticipate the kinds of interactions that characterize each stage and to predict problems that might arise in order to appropriately intervene. In this way, the movement of the group towards its expressed goals is facilitated.

These stages of group development are:

1. Forming
2. Storming
3. Norming
4. Performing

Forming

At this stage, newly formed groups are testing the waters while swimming in the dark! Members may be watching each other closely and may be suspicious of each other. Relations are characterized by dependency on a leader to provide all the structure, agenda, or ground rules. The group's focus is on the work that it was asked to do. Common questions include why we are here and what are our goals.

Storming

At this stage, the group members are beginning to learn about each other and begin to express their own feelings. There is plenty of confusion about each other's roles and plenty of potential conflict to go around. This interpersonal conflict inevitably ensues as a part of small group interaction. It may be that the conflict remains hidden but it is there. Members bring to small groups activities a lot of their own unresolved conflicts with regard to authority, dependency, rules, and agenda. Common questions include who is being responsible for what, what are the rules going to be, how we will be rewarded, what are the limits.

Norming

The group has established ground rules and norms for working together effectively and comfortably. There is less conflict and more cohesiveness. The group still may rely on an outside facilitator to get things done. The main work issue may well be the data flow. Members are beginning to feel a sense of "group-ness"! They begin sharing ideas, feelings, giving feedback to each other or soliciting feedback, and sharing information related to the task. Members generally feel good about what is going on.

Performing

As an advanced and mature team, it is now producing results. Its members are very knowledgeable and confident about each other while their needs are being met. This stage is marked by interdependence on relationships and problem-solving. Not every group reaches this stage. Activities are marked by cooperation, commitment, and functional competition.

4.5 Co-Tutoring

- When 2 trainers are working as a team, they need to agree how they are going to work together.
- There are real bonuses in working as a team, particularly if trainers have different styles, as it provides variety for the trainees and also helps you retain freshness.
- The trainer not delivering can be observing the group and can give valuable feedback to their partner on the responses from the group.
- This can be a tremendous source of feedback and personal growth as the trainers learn from each other.
- Planning the inputs carefully and having a dry run can help the situation.
- You should set the ground rules so that you have a clear understanding on how you will work together. Healthy debate is positive, but trainees do not want to witness trainers competing with each other, or to be confused when they argue or give conflicting views.
- Equally important is agreeing how to add supplementary information. Sometimes the other trainer wishes to contribute to the discussion, which should be done at an appropriate moment by giving an agreed signal to the trainer who is delivering, who can then bring the co-tutor into the conversation.

4.6 Tips on Using Visual Aids

4.6.1 Flipchart

Advantages	Disadvantages
• Easily portable • Quick to set up • Relatively low capital outlay • Uses the groups' words • Spontaneous	• Sheets have limited space • Dramatic effects are limited • Pre-prepared sheets must be stored flat, otherwise they curl • Writing needs to be clear/spelling accurate • Difficult to see if the group is large

Tips for using the Flipchart
- Check that you have enough paper for the amount of writing you intend to do
- Check that it is positioned where the group can see it
- Check that you have pens that work (lots of colors - do not use pale colors, and only use red for underlining
- Write legibly, i.e. large, clear writing in a straight line
- Stand to the side and talk forward to the group
- Take care with spelling
- Use the words of the group
- Use it for spontaneous discussions
- Use headings and sub-titles as appropriate
- Take your time while writing
- Plan in advance the layout of the chart
- When not needed as a visual support, turn to a blank sheet
- Drawings, etc. can be prepared beforehand invisible in light pencil

4.6.2 Overhead Projector (OHP)

Advantages	Disadvantages
• The trainer can face the group • Good impact especially if color overlays are used • Can be pre-prepared • Clean and quick • Slides can be re-used time and again • Can be used without complete darkening of a room	• Water soluble pens may smudge • Non water soluble pens make mistakes difficult to remove • A screen is usually needed in addition to the OHP • Electric power is needed • Less flexible as information is usually pre-written onto slides • Your words not the groups'

Tips for using the OHP
- Produce OHP's using PowerPoint
- Use for pre-prepared visual
- Use of color - be careful of pale colors and use red for underlining
- Use of headings
- Check that there are no spelling/grammatical errors
- Check that focus and positioning before starting
- Keep it in good working order
- Make sure you have spare bulbs/fuses and know how to use them
- Allow plenty of time for the slides to be read by the group
- Use overlays or masking to reveal information gradually
- When drawing attention to items, point at the slide, or the screen, whichever is less obstructing
- Check that the information can be seen by all the group before starting
- Keep the slides in the exact sequence
- Switch off when changing slides and when OHP is not required

4.6.3 PowerPoint Slides

Advantages	Disadvantages
• Quality of visuals and graphics • Use of colors • Easy to produce • Easy to change and store	• The LCD fan can be noisy • The equipment is expensive • The lights usually have to be dimmed – affects note-taking • Technology sometimes breaks down

Tips for using PowerPoint Slides
- Check the equipment
- Stand to the side and talk forward to the group – don't walk in front of the screen when the projector is on
- Do not read from the screen
- Make sure the screen can be seen by everyone
- Use headings
- Limit the information on each slide
- Use bullet points
- Use a large font for the body of text, e.g. 28 point
- Check visibility – avoid pale colors
- Use pictures / photos to add interest
- Limit special effects
- Limit number of slides
- Press 'B' or 'W' to blank the screen when necessary
- Place a full stop at the end of the last bullet point, as a marker to yourself
- Allow participants time to read the slide content before moving on

General Presentation Guidelines

- Reveal OHP transparencies by using a piece of paper under rather than on top of the transparency (this prevents the paper from falling off)
- Do not read from the slides. Make key points instead
- Use a pen to highlight the points by laying it on the overhead projector itself rather than prodding the screen
- Use laser beams or pointers only if you are comfortable with them
- If you are using a PC-generated presentation ensure you are totally in control of the equipment
- The same principle applies to video equipment of any sort. Practice beforehand with the equipment to ensure that it all works
- If in a strange venue, make arrangements for someone technical to be on hand to help you if there is a problem with equipment. Always check there are spare bulbs etc.

4.7 Training Implementation Pressures

In this section, you will review how to deal with various situations that might arise during training implementation:

Pressures
1. Dealing with difficult personalities
2. Dealing with language barrier
3. Dealing with no-shows
4. Dealing with resistance
5. Problem with Training venue
6. Problem with equipment
7. Emergencies
8. Security

1. Dealing with Difficult Personalities

During your training sessions, many participants will attend from various backgrounds; you will encounter various types of personalities. These will include positive and negative traits, such as:

A. The loud, aggressive, extravert
B. The cynic – bored, not interested
C. The ‘know it all’
D. The talkative
E. The clown, entertainer
F. The shy, introvert

Below are some recommended ways to deal with each personality type:

A. Loud/Aggressive

- Seat to your side, not opposite
- Ask directed questions
- Use the group to bring them over (The group is usually on your side!)
- Do not confront them in front of the group – approach and discuss their behavior privately during the break
- If aggressive behavior does not improve, remove from the group

B. Not interested/Cynic

- Find out why
- Training might be too easy or too difficult
- Identify a personal benefit for that person
- Ask directed questions

C. 'Know-it-all'

- Allow them to get out of their depth from time to time by talking too much
- Question them precisely- usually they don't know it all

D. Talkative

- Do not allow them to control the class
- Occasionally ask directed questions
- Close down their conversation by bringing in someone else by name
- Privately praise them for their contribution, but explain that the rest of the group must have the chance to contribute

E. Clown/Entertainer

- Humor and fun are good for a training session but don't let this person dominate
- Let them perform occasionally by leading group work and activities
- Seat to your side – extreme right or left
- Ask directed questions
- Clearly and firmly 'signpost' the session with verbal cues "Lets move on to…."

F. Shy/Nervous

- Ask simple questions
- Ask PPP (Pose, Pause, Place) or direct questions to include them in the group
- Don't spotlight
- Place in pairs and group work
- Seat opposite you, so you don't forget them

2. Dealing with Language Barrier

In your work as a Trainer, language could become an issue in the training session, especially ones that you will conduct outside the NGO. If you are communicating in English for example, there may be non-native speakers in your group who have difficulty in keeping up. Here are some suggested actions you can take:

- Send them the material before the session so that they have time to read it
- Assign a 'buddy' who speaks the same language and can assist/coach the trainee during breaks. Discourage translation during 'whole group' activities as this can distract other trainees
- Meet the individual after training for individual coaching. Have a translator present
- Enlist the help of a colleague who speaks the native language to help you translate key points, handouts and worksheets
- Encourage trainees to make notes in their own language
- Schedule 'common language' groups together, and arrange for a translator to assist you. Be aware that with simultaneous translation, a training session will take at least twice as long
- If written language is an issue, rely on pictures, visuals, diagrams, limited text

3. Dealing with 'No-Shows'

A dramatic drop in number of trainees for a variety of last-minute reasons may mean that the program is no longer viable in terms of interaction. In such cases, you have to make a series of judgments:

- If the program is part of an internal rollout program at the NGO, are there others nearby who could be released to attend? Always clear this with their managers
- Make a decision to postpone or cancel the event. Ideally this decision should be made before the day of the event to avoid anyone making an unnecessary journey. Once you find out that numbers are low for an event, try calling around for likely extra numbers. If it is an internal program, talk to the sponsor and the managers
- All no-shows should be recorded on a special log. Names and reasons for no-show should be discussed with the employee and related manager
- If no-show is a recurring pattern in one employee's behavior, you can decide not to schedule the employee to attend development programs in the future
- Monetary deductions can sometimes be applied, but it all depends on the culture of the NGO

4. Dealing with Resistance

Despite your best preparation and working in your most facilitative style, you may find yourself in a situation when you have to handle trainee resistance from NGO employees or from outside the NGO.

Reasons for Resistance
Lack of notice about a training event or resentment at being 'sent'
Nervousness on trainees' part about attending
Not wanting to be 'shown up' in front of colleagues
Personal reasons unrelated to the event
Personal chemistry issues between trainees, or between trainees and the trainer
Issues with the NGO management

This may manifest itself in many ways: tension in the training room, trainee not getting involved in the course, lacking interest, arriving late, wanting to leave early or creating verbal challenges. Below are ways to deal with such situations.

A. Before the training event

Talk to trainees' managers, ensuring that the managers and the trainees are clear about the importance of the course and that trainees are being prepared appropriately. Discuss any potential issues with the managers, particularly if there are personal issues or circumstances at the NGO that may influence your event.

B. At the start of the event, in the Training room

Establishing some ground rules at the start of the event can help in terms of mutual respect and support. Demonstrating that you understand organizational issues, being flexible and adaptable in the way that the course is structured, allowing regular breaks and organizing access to all-day refreshments will all help to create an environment that is conducive to learning and supportive to the trainees.

C. During the Training event

You need to be aware of the form the resistance is taking, being alert to what is happening at all times during the course. You will sense resistance, see resistance when someone is not participating, sitting back, arriving late, not paying attention or distracting others, and hear resistance with muttered comments, direct challenges and hostile comments in small groups as well as unnatural periods of silence.

Be prepared to take time out to identify the cause. Refer back to the objective and main agenda of the event including the trainees' expressed needs and seek to identify the reasons for lack of concentration and establish a joint commitment to work together to overcome any issues.

If the situation becomes particularly difficult, suggest a coffee break and handle the situation one to one with the particular trainee. During the coffee break take the individual aside and try to identify the root of the issue. If it is appropriate, allow the individual to suggest that he/she leaves the course - hopefully this will only occur as a last resort.

D. Following the Training event

Regularly discuss progress with the NGO Management, program sponsors and be open to any feedback that they have received. Seek to identify areas for improvement and work to make sure that at the next event the lessons learnt can be applied in the new context.

5. Problems with the Training Venue

Make no assumptions but always check and confirm any related detail. Try to visit the venue, or obtain recommendations from others. Work towards achieving dedicated space in the NGO that is suited to training events. Whatever difficulties you experience, do not let this interfere with your training event. Your trainees will forgive accommodation and catering difficulties, but not an uninspiring event. Always be professional and put your complaint in writing.

6. Problems with the Equipment

If any of the equipment fails you, hopefully you can carry on, particularly if you have training materials back-up (guide with the OHP slides copied). If the video fails, you may have to talk through the content, or move it to a later part of the program while the machine is repaired.

Remain calm and always ask for help quickly rather than entertain the trainees with your attempts to make the machine work!

7. Emergencies

As a matter of course you should always check the emergency procedures at every venue and such things as fire exits, assembly points and first-aid facilities. An awareness of others' safety and survival should be your number one priority, and even if it seems like only a fire drill, you should ensure that all your trainees leave the building and take with you a list of the trainee names. Wait to be told before re-entering the building. In today's environment of uncertainty it is particularly important to ensure that everyone is aware of all evacuation procedures.

H. Security

Training programs present a number of security problems, especially if conducted outside the NGO premises. It is likely that trainees will be taking off their jackets, and handbags and briefcases may be left unattended as people move from room to room undertaking activities. You need to encourage people at the start of the day to be vigilant. Arrange for the door of the training room to be locked at lunchtime, and encourage trainees to take their wallets and valuables with them.

4.8 General Advices for the Trainer

4.8.1 Physical Warm-up Activities for a Trainer

In the same way that actors, singers and sports people warm up before their performance, so can you. Try some of the following exercises.

- Face - give your temples a soothing massage and rub gently around your cheekbones.
- Mouth – pretend that you are chewing a large, sticky toffee, very slowly, to exercise your jaws. After a minute, imagine that you have finished but there are some sticky bits on your teeth, that you need to clean by stretching and twisting your tongue. Now practice a smile by imagining that you are happy.
- Hands – shake your hands energetically from the wrist for two bursts of 30 seconds. The faster the better.
- Breathe deeply – breathe in and out, mentally counting to five as you do so.
- Voice – practice projecting your voice, standing at the far side of the room. Singing is also a good way to prepare your voice for training!
- Your mouth is dry? Bite the very tip of your tongue to start the juices flowing.

4.8.2 Managing Your Style

- Prepare well
- Prepare a box containing all the support material that you may need. Sample contents could be:

  - Pads, pens, tent cards/name badges for the trainees. If you are using a hotel for venue, check what they are supplying
  - Marker pens, blu-tack, masking tape
  - Additional papers for individual and group activities
  - Stapler and staples, paperclips, stick-it notes, scissors, glue, rubber, ruler, pencils
  - Calculator (sometimes required for group activities involving finance)
  - Other items: rewards, prizes for games
  - Bags of chocolate, candies, etc…depending on your budget

- Practice with your learning partner and ask for feedback. Practice in front of a mirror.
- Think positive – assume that the trainees want you to succeed and will enjoy the session.
- Do a visualization activity.

- Make sure that you have planned your opening words.
- Use the Introduction phase to relax yourself as well as the group.
- Have good learning aids – they will take attention away from you.
- Encourage interaction, manage questions and help everyone to contribute and feel part of the event.
- Develop the ability to answer the questions, widen the debate to include others as appropriate and then to move on. Always acknowledge a good question and try to respond positively, even if it is a sensitive area. If you do not know the answer, or the questioner appears to want to monopolize the session, suggest that you discuss it with them later on a one-to-one basis.
- Sometimes you may have to handle conflict, or facilitate the group to handle difficult situations. Always be sensitive. Recognize individual learning styles and the differing needs and experience of individuals. During the event you should be ultra-observant, ensuring that the group stays with you and recognizing when someone is struggling or feeling uncomfortable.
- Take time during the breaks to get to know them, and try to encourage them to articulate their concerns so that you can help them to overcome the issue, either during the program or after the event, perhaps through coaching. It is not appropriate to discuss potentially sensitive areas in front of an individual's peers, and you need to respect their need for privacy.
- The more relaxed you are the better you will be able to work with the group. If you are co-tutoring, you must establish a way of working that lets you both use your individual strengths to facilitate the progress of the event.
- The pace of the day should be carefully controlled to allow for maximum participation from the trainees. It is important not to have too much input from the trainer at one time; instead structure these slots throughout the day. Carefully watch your group for signs of boredom, discomfort or loss of involvement.
- You also need to manage your own energy levels, as running training events can be exhausting. Eat and drink sensibly during the day to ensure a balanced sugar level. Sometimes trainers find themselves running out of energy or getting 'hyper' because they have eaten the wrong food or drank too much coffee during the day. Five light snacks may be better for you, using fruit where possible.
- Try to avoid providing heavy lunches and encourage trainees to get some fresh air, which will help them to maintain concentration.
- If you have time, also take a break outside, it will help to clear your head from the morning's events. Use the time to review the progress of the group, either by yourself or with your co-tutor.
- Always plan a practical activity for after lunch, traditionally known as the 'graveyard slot', because trainees often find it hard to concentrate at this time.
- Keep checking the temperature in the room during the day. Sometimes there is a build-up of heat as the day progresses, which results in the trainees feeling tired.
- You should also be assessing what progress is being made against the objectives. Are you achieving what was hoped for? Do you have any outstanding trainee requests that have to be met? Are you running to time? Do you need to amend any of the content? Have you encouraged the trainees to mix with each other through different pairings or syndicate work? Always be flexible, but stay in control of the overall process.
- As the day reaches its conclusion you should either be summarizing and encouraging the group to identify their action plans, or setting up evening activities and/or plans for the next day if it is a longer program.

4.9 Marketing the Training Activities

A good trainer must also be a good marketer. The following section will give you some guidance on marketing to individual employees and your NGO as a whole.

The most important marketing aspect is to make sure that the programs you develop are based on needs of the NGO. If you have done this, getting people to attend your sessions is much easier.

You also need to publicize your courses through a newsletter, announcements, or emails. Word of mouth is still the best advertising; however, nothing will draw trainees to your courses like the common knowledge that the program is worthwhile. Spread the word through previous participants who have already attended your program.

Paper-Based Marketing: Despite the pervasive presence of computers, sometimes a colorful sheet of paper and a copy machine can be your best marketing tools. You can create flyers to insert in envelopes, post on notice boards, deliver through internal mail, and don't forget the good old booklet of course offerings. This provides a good reference for employees and supervisors who are looking for development. You might also create a periodic learning NGO newsletter.

Electronic Marketing: You can really wow your trainees using the computer that most of your trainees work at all day long. Here are a few ways to effectively market through electronic means:

- Electronic flyers that pop up on internal computers from time to time
- Email announcements of new courses
- Announcements on the NGO's home page of new offerings (if applicable)
- An electronic news page that is published periodically to bring trainees up to date on learning processes

You need to garner buy-in for your training projects from the NGO management. Here are a few additional tips:

- To gather management support, create executive summaries of your courses that managers can sit through in 15 or 20 minutes
- Go to management meetings at all levels, and discuss with the managers how your courses meet their needs
- Hold individual meetings with managers and supervisors to show them the objectives and topic outlines, and then ask for their support
- Ask that announcements of new training programs be a part of every management meeting

4.10 Training Maintenance

- You need to keep your information up to date so that it's accurate when it's used again.
- Devise a system that requires each training program to be reviewed at regular intervals.
- Depending on the program and its content, this review might happen every six months, every year, or even every two years.
- The review examines key content to determine if it needs to be changed, added to, or deleted based on the needs of your trainees.
- A trainer might make these decisions based on an evaluation of the effectiveness of the course.

Chapter Five

Evaluation in Training

Evaluation in Training

5.1 Evaluation in Training

This section provides you with the foundational concepts and components for conducting an evaluation within a training project. The sequencing and application of each concept and component is explained in detail within the following sections in order to enable you to develop a comprehensive and effective evaluation system for any training event. The primary concepts and components presented within this section are the following:

- General training evaluation concepts
- Developing an evaluation plan
- Evaluating reaction
- Evaluating learning development
- Evaluating behavioral change
- Evaluating NGO/Community results

Evaluation is a set of activities used to assess an ongoing or completed program, its design, implementation and results. The purpose is to determine the fulfillment of objectives, effectiveness, impact and sustainability according to predetermined indicators. While training topics and formats vary, training programs strive to deliver knowledge and information, increase abilities and skills and move their trainees towards a positive understanding of a particular subject.

5.1.1 Levels of Evaluation in Training

Evaluation in training seeks to discover development within the following four areas[1]:

Level	Goal
Level 1: Reaction	An attempt to obtain impressions, observations and comments from the trainees regarding the training content, the trainer, the techniques, the materials, the facilities, the interaction, the environment, the goals and benefit of the training.
Level 2: Learning Development	An attempt to assess how much the trainee learned, the extent of new skills developed, and his or her ability to practically apply the knowledge, concepts or ideas.
Level 3: Behavioral Change	The attempt to measure the training's impact on the trainee's pattern of behavior in life; at his or her work, at home or within the community.
Level 4: NGO/ Community Results	The attempt to measure the overall success of the training objective at the NGO or community level.

1 Evaluating Training Programs: The Four Levels, Donald L. Kirkpatrick and James D. Kirkpatrick; 3rd Edition; Berrett-Koehler Publishers, Inc.

5.1.2 Types of Evaluation in Training

Type	Timing & Purpose	Expected Benefit for the Training Program
Pre-Assessment	Prior to or on the first day to determine the trainees' initial ability and readiness.	Provides the trainer with understanding of the trainees' initial knowledge and needs.
During Training	During specific pre-determined points to know the extent of understanding and familiarity of the trainees.	Provides the opportunity to improve the used techniques and means within the training.
Post-Assessment	At the end of the training to assess the trainees' knowledge and accomplishments of the training.	Assessment of achieved goals and the opportunity to improve future training courses by seeing overall benefit.
Follow-up on Training Impact	No earlier than one month after the conclusion of the training to assess the trainees' practical application and the resulting impact.	Restructuring the general training program, inputs, and contents on an individual and NGO level.

5.1.3 Techniques of Evaluation

- Direct observation - This relies on the monitoring of a trainee's performance and focus on work items during the training or by the administration. This is conducted by the trainer, training program staff or the trainee's administration. This technique is limited in determining the amount of learning development within an individual.

- Questionnaires and Surveys
  - Yes/No Question based
  - Selection of sentences that display the impact of the training
  - Selection of level of impact or importance
  - Open-ended questions

- Tests
  - Traditional tests - Correct answers are determined and a minimal score is required.
  - Pre and post training assessments - Correct answers are determined but no minimal score is required. The aim is to display the trainee's progress from start to finish

- Face-to-face Interviews - This technique enables collection of data for all levels of evaluation. The primary subjects are training trainees, the trainer, a trainee's manager or colleagues, or targeted beneficiaries.

- Group Discussions or Focus Groups - This provides direct access to the opinions, emotions and experience of the recipients or the intended beneficiaries of the training.

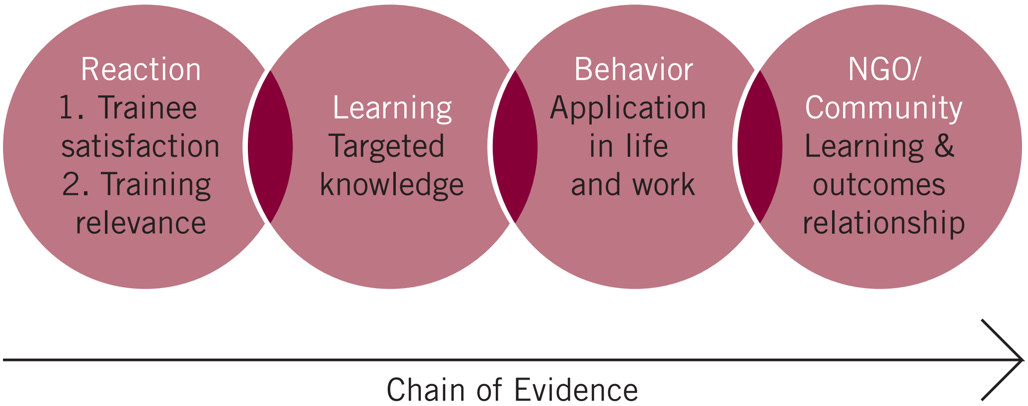
The various techniques are applied within each level of the evaluation as follows:

Level of Evaluation	Techniques of Evaluation
Level 1: Reaction	• Questionnaires and surveys • Face-to-face interviews • Discussion groups
Level 2: Learning Development	• Pre & Post Self-Assessments • Pre & Post tests • Standardized tests • Direct observation – checklists • Individual exercises (recorded exercises, teach-back… etc.) • Group exercises (role-play, games…etc.)
Level 3: Behavioral Change	• Questionnaires and surveys • Direct observation – checklists • Work reviews • Face-to-face interviews • Discussion groups
Level 4: NGO/ Community Results	• Questionnaires and surveys • Face-to-face interviews • Discussion groups

5.1.4 Building a Chain of Evidence

As stated above, a training evaluation needs to report on the fulfillment and sustainability of pre-determined indicators, but how should this be done? It is difficult to provide exact "proof" for the value of training, but the levels of evaluation (Sec. 5.1.1) enable you to compile compelling "evidence" of value for managers, donors and other stakeholders. In order, the levels build on each other displaying results which are linked creating a "chain of evidence" which is used to display the value of any training project as shown in (Figure 5.1).

Figure 5.1



Management, donors and other stakeholders desire to see a "return on expectation" (ROE) for the time, personnel and money they invest in training. As a result, a training evaluation must provide meaningful information that addresses the ROE. The combined results from each evaluation level or "chain of evidence" gives you the data needed to show the ROE of a specific training project.

Always keep in mind the ROE of any training project, since it will be the basis on which the success of the project is determined.

5.1.5 Challenges in Training Evaluation

In the midst of any evaluation, you will face challenges which originate from various sources:

- Unclear training objectives and goals
- General misunderstanding of qualitative research methods
- A lack of financial resources and administrative assistance
- Misconceptions about evaluation from both trainers and trainees
- The NGO environment from which the trainees come from
- External factors and personal which influence the trainees

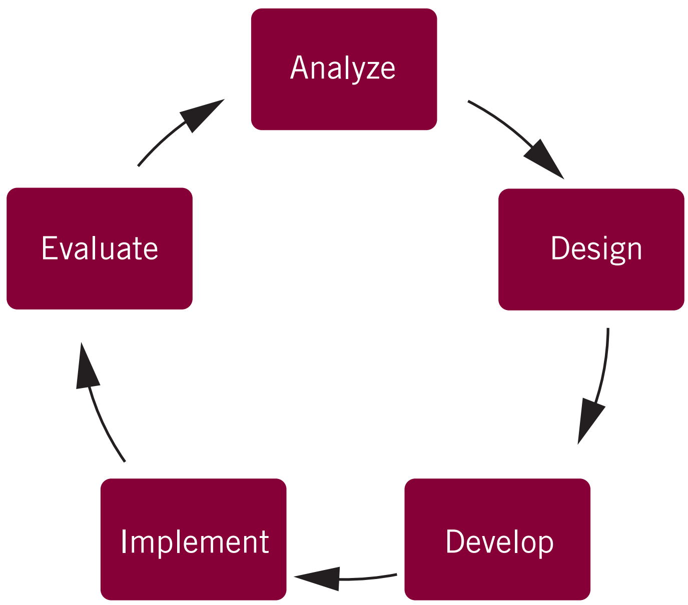
5.2 Developing an Evaluation Plan

The creation of an evaluation plan is an essential component for the training program's success. It provides a structured roadmap for planning, implementing and analyzing data at each level of evaluation. This section provides you with a structured framework for developing the overall training evaluation plan. The framework includes the following components:

- The ADDIE design model overview
- Determination of the evaluation objectives
- Structuring the evaluation activities
- Creation of evaluation tools and techniques
- Conducting the evaluation activities
- Reporting the evaluation results

A useful methodology for developing an evaluation plan is the ADDIE[2] instructional design model (Analyze, Design, Develop, Implement and Evaluate). This model provides a logical sequence of steps which provide a roadmap for constructing the primary aspects of an evaluation plan. In Figure 5.2 you are able to see the application of each ADDIE phase in relation to each level of evaluation.

Figure 5.2



2 The ADDIE Model, http://www.addiesolutions.com

5.2.1 Analyze: Determine Evaluation Objectives

The objectives of each evaluation level must be determined, and this is best accomplished by analyzing the evaluation levels in reverse order (Figure 5.3).

Figure 5.3

The objectives can easily be discovered by asking a few key questions to the appropriate sources of information as shown below:

Level	Key Questions
Level 4: Evaluate NGO/ Community Results	What are the overall results or expectations of the training within the NGO or community?
Level 3: Evaluate Behavioral Change	What behaviors lead to the overall results?
Level 2: Evaluate Learning Development	What needed skills or knowledge are required for the desired behavior?
Level 1: Evaluate Reaction	How do we assure quality training services?

The answers to these questions should be within the training needs assessments, training plan, community needs assessments, donors or stakeholder research.

Record the objectives for each level (Template 5.1), for these will be the indicators by which all evaluation activities are based.

5.2.2 Design: Structure the Evaluation Activities

Once the evaluation objectives for each level are determined, you are ready to design the structure of the training evaluation. To supplement the objectives review the additional information:

- Training Agenda – duration, dates and times, session titles and content summary
- Profile of trainees – observe special considerations (i.e. gender issues, children's needs, privacy…etc.)

The objective of this stage is the determination of the following:

- Appropriate evaluation activities for each evaluation level
- Timing of evaluation activities
- Completion of the evaluation plan tracking form

As the evaluation design is being developed the following are some helpful questions to ask in conjunction with the previous gathered information:

- Are the objectives for each level clear?
- Is the extent of the training objectives clear?
- Are there knowledge topics or skill areas grouped together or separate?
- Are there phases in the training program?
- Are there different types of training in the program? (i.e. lecture style, practical application, on-the-job training…etc.)
- Does the training topic require special consideration? (i.e. gender issues, drug addiction issues, illegal activity issues, disability issues, children's issues…etc.)
- Do the trainees require special consideration? (i.e. rural communities, women, children, level of literacy…etc.)

As the structure of the evaluation plan is developed, having a tracking form for tracking all the evaluation activities is essential. Figure 5.4 provides an example of an evaluation tracking form which organizes the training components, evaluation types, techniques, as well as date and people responsible for the implementation.

The following are some of the benefits for using an evaluation tracking form:

- Quick review of planned types and techniques
- Easy discovery of gaps in the evaluation planning
- Easy determination if evaluation is planned for all four levels (Sec. 5.1.1)
- Tracking of completed and in progress evaluation activities

Figure 5.4 Example of an evaluation tracking form

Training Program Title: Qualitative Research Methods Training
Duration of Program: January 1 to March 30, 2009

Training Objectives	
Level 4: Evaluating NGO/Community Results	• Increased use of qualitative research methods in NGOs • Increased dialogue between NGOs and beneficiaries
Level 3: Evaluating Behavioral Change	• Including qualitative research methods in program designs • Use of qualitative research methods for program determination
Level 2: Evaluating Learning Development	• Focus Group methodology • Practical ability to design, facilitate and analyze a focus group
Level 1: Evaluating Reaction	• Reaction collection within all phases of training

Stage	Program Activities	Evaluation Type	Evaluation Technique	Date	Responsible Person	Evaluation Level	Notes
Workshop	Workshop 1	Pre	Knowledge quiz	01-Jan-09	Sara Clark	Learning	1st day
		Pre	Trainee Assessment	01-Jan-09	Sara Clark	Learning	1st day
		Post	Workshop 1 questionnaire	03-Jan-09	Jim Scott	Reaction	
Field Work	Conducting focus groups	During	Field Work questionnaire	26-Feb-09	Sara Clark	Reaction	
Workshop	Workshop 2	Post	Workshop 2 questionnaire	30-Mar-09	Jim Scott	Reaction	Last day
		Post	Discussion Group	30-Mar-09	Jim Scott	Learning	Last day
		Post	Knowledge quiz	30-Mar-09	Jim Scott	Learning	Last day
Follow-up	Trainee survey	Follow-up	Follow-up questionnaire	01-Jun-09	Jim Scott	Behavior	
	Manager survey	Follow-up	Follow-up interview	15-Jun-09	Jim Scott	Org./Com	

5.2.3 Develop: Creation of the Techniques and Tools of Evaluation

This process involves the production of the various types (Sec. 5.1.2) and techniques of evaluation (Sec. 5.1.3) for each of the evaluation levels. Details regarding the appropriate types of techniques for each level are provided in the following sections. (Refer to sec. 5.3, 5.4, 5.5 & 5.6).

5.2.4 Implementation: Conducting Evaluation Activities

This involves the conducting and tabulating of results from surveys, questionnaires, pre and post-program assessments, direct observation, focus groups and other techniques according to the evaluation plan. Details regarding implementation issues for evaluation techniques are provided in the following sections. (Refer to sec. 5.3, 5.4, 5.5 & 5.6).

5.2.5 Evaluate: Reporting Evaluation Results

After all evaluation activities are completed and the data are tabulated, the final training evaluation report will be produced and submitted to the administration. The final evaluation report will display a "chain of evidence"[3] resulting from activities at each evaluation level. This evidence will display the training program's success or failure at achieving the intended objectives. Details regarding the format and creation of the final evaluation report are covered in Sec. 5.7.

5.3 Evaluating Reaction (Level 1)

It is vital to obtain the reactions of the trainees in order for the training program administration to understand the level of satisfaction and relevance of the training. This is the first step of building a strong chain of evidence. This section provides practical methods on how to obtain and use the trainees' reactions. The methods include the following components:

- Benefits of trainees' reactions
- Training components to be evaluated
- Designing and analyzing reaction forms
- Conducting face-to-face interviews or discussion groups
- Tips for obtaining trainees' reactions

3 Implementing the Four Levels, A Practical Guide for Effective Evaluation of Training Programs. Donald L. Kirkpatrick and James D. Kirkpatrick, Berrett-Koehler Publishers, Inc., San Francisco, 2007.

The benefits of collecting these reactions are the following:

- Provides information for evaluating the quality of the program
- Provides comments and suggestions for future program improvement
- Communicates that the trainees have a role to play in the effectiveness of the program
- Provides trainers with quantitative information that could be used to establish standards of future performance

Trainees' reactions should be gathered for the following training components:

- The schedule
- The trainer(s)
- The training content & materials
- Relevancy to the trainee
- Administrative support
- Facilities
- Meals
- Transportation

5.3.1 Developing a Reaction Form

There are many philosophies regarding form design and use. Some prefer designs which are entirely made up of open-ended questions while others use a few check boxes. The optimal design provides the maximum amount of information and requires the least amount of time to complete.

Reaction forms are usually comprised of two types of questions; questions with selection choices (Likert scale or numeric scales) and open-ended questions.

The following are examples of different formats of questions with selection choices:

	Excellent	Very Good	Good	Fair	Poor
How do you rate the facilities?					

	Not at all	To some extent	Very much
How appropriate was the subject to your needs and interest?			

	Strongly disagree			Agree				Strongly agree		
The instructor(s) presented information in a professional manner.	1	2	3	4	5	6	7	8	9	10

	High				Low
How do you rate the schedule? (Time, length...etc.)	5	4	3	2	1

Questions with selection choices provide an opportunity to collect a large amount of data displaying impact levels perceived by the trainees. These can then be easily tabulated into quantitative results for management or used as future performance standards.

The following are examples of commonly used open-ended questions:

- What are the points of strength of the training program?
- What are the points of improvement for the training program?
- What aspect of the training program was most beneficial to you?
- What would have made the training program more effective?
- What are the suggestions for future improvement?

Although these are commonly asked questions, appropriate open-ended questions should be chosen and developed based on the training content, format and objectives.

When designing a reaction form, the layout is made up of standard items:

- Logo(s) of sponsoring NGO(s) within the form header
- Title of the training program
- Participation request – 3 or 4 lines stating the purpose of the form, requesting truthful responses and confirming the importance of the participant's responses for overall quality.
- Instructions regarding how to fill out the form
- Questions with selection choices grouped together
- Open-ended questions grouped together

In order to obtain the highest level of honesty from the trainees, it is suggested that the reaction forms do not contain a name field. If a name field is required, then placing "optional" next to it is the second best option.

While NGOs and trainers prefer various formats of reaction forms, there are two primary types of forms; *standard* or *customized* training reaction forms. Both form types evaluate the primary training components, employ the same general structure, but differ in the level of detail obtained.

Standard training reaction forms provide a format that can be applied to any training program. This increases efficiency in data tabulation and decreases development effort prior to the program. The primary weakness is the inflexibility of the form to provide specific data for unique components within the program. Figure 5.5 is a summary view of a standard training reaction form.

Figure 5.5 Standard Reaction Form

Please provide your honest feedback regarding the effectiveness of the program in meeting your needs. Your responses will help us to maintain and improve the quality and relevance of future training programs.

Please circle your response to each statement.	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1. The workshop's objectives were clearly stated.	1	2	3	4	5
2. The workshop's objectives were achieved.	1	2	3	4	5
3. The workshop satisfied my professional needs in this area.	1	2	3	4	5
4. The workshop's content was interesting.	1	2	3	4	5
5. The facilities provided a suitable environment for training.	1	2	3	4	5
6. The trainer(s) was/were effective.	1	2	3	4	5

Please circle "Yes" or "No" for the following statements			If "No" please comment
1. The duration of the workshop was right for me.	Yes	No	
2. The pace of the workshop was right for me.	Yes	No	
3. The level of difficulty of the content was right for me.	Yes	No	

1. Please write the training program's areas of strength from your point of view.

2. Please write the training program's areas of weakness from your point of view.

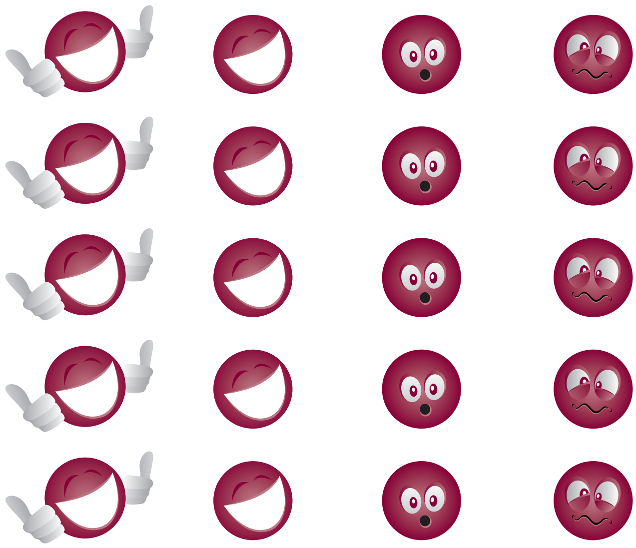
3. What aspect of the training program was most beneficial for you?

4. How can we improve this training program?

Refer to Template 5.2 “Reaction Form – Standard” for future modification and use. Standard reaction forms can also use graphics for trainees to choose. The following shows part of a reaction form that uses smiley faces as choices for the trainees. To view the entire form, refer to Template 5.3 “Reaction Form – Standard Smiley”.

Figure 5.6 Standard Reaction Form – Graphical

The training facilities	Very Good	Good	Average	Poor
1. The training room’s chairs and tables were comfortable.				
2. The temperature in the training room.				
3. The lighting within the training room.				
4. The training equipment (laptops, projector, flip-charts…etc.).				
5. Space provided for group work sessions.				



Customized training reaction forms are designed based on the training plan of a specific program. This requests reaction data for each of the program’s components. As a result, the administration has the ability to evaluate each program component versus the program as a whole. However, this requires more development time prior to training, and customized data collecting tools for tabulating the results. Figure 5.7 is a summary example of a customized training reaction form. In addition, Template 5.4 “Reaction Form – Customized” is provided for future modification and use.

Figure 5.7 Customized Training Reaction Form

In order to determine the effectiveness of our program in meeting your needs and interests, we need your input. Please provide us with your reactions, and make any comments or suggestions that will help us serve you better.

Instructions: Place an X in the column 1, 2, 3 or 4 to indicate our evaluation of each item.

Introduction and Training Objectives		Negative 1	2	3	Positive 4
1.	Appropriate				
2.	Organized to facilitate learning				
3.	Clearly stated				
4.	Agenda encouraged participant involvement				
5.	Sessions/exercises helped accomplish overall objectives				

Comments:

Session 1: Concepts, Expressions and Means used in Human Rights Advocacy		Negative 1	2	3	Positive 4
6.	Organized				
7.	The organization helped facilitate discussion between trainees				
8.	Session time was adequate				
9.	Content of the session was appropriate				

Comments:

Session 2: Human Rights according to the United Nations		Negative 1	2	3	Positive 4
10.	Organized				
11.	The organization helped facilitate discussion between trainees				
12.	Session time was adequate				
13.	Content of the session was appropriate				

Comments:

Training Content		Negative 1	2	3	Positive 4
14.	Accurate				
15.	Current				
16.	Adequate in scope				
17.	Sequenced properly				

Comments:

Training Setting		Negative 1	2	3	Positive 4
18.	Comfortable				
19.	Quality materials and visual aids				
20.	Adequate equipment				
21.	Administrative support				

Comments:

Trainer: Jack Smith's Delivery		Negative 1	2	3	Positive 4
22.	Effective presentation style				
23.	Preparation/knowledge of material				
24.	Actively solicited participation				
25.	Respectful of participant's contributions				

Comments:

26. Name the session you enjoyed the most. Why did you enjoy it?

27. Name the session you found the most difficult to follow. What made it difficult?

28. In your opinion, how was the balance between theoretical and practical training in the program?

29. How has the training expanded your understanding of the United Nations role in advocating Human Rights?

5.3.2 Analyzing the Reaction Form

Both questions with selection choices and open-ended questions can be easily analyzed. A numerical tabulation can be created for questions with selection choices, while free response questions can be organized into lists.

The following are the steps to tabulating questions with selection choices:

- Assign a Numerical Value - For each selection choice assign a numerical value. The choice of starting with a high or low value does not impact the results. The following are examples of assigning numerical values on a form

Excellent	5	Strongly Agree	5	Very much	3
Very Good	4	Agree	4	To some extent	2
Good	3	Neutral	3	Not at all	1
Fair	2	Disagree	2		
Poor	1	Strongly Disagree	1		

- Determine the Average Rating – Tally the responses in each category for all items. For each item, multiple the value assigned by the total number of responses. Then divide the number by the total number of responses received. The following are the results of twenty participants completing the standard reaction sheet in Figure 5.8

Figure 5.8 Standard Reaction Sheet

Please circle your response to each statement	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)	Rating
1. The workshop's objectives were clearly stated.	0	0	2	12	6	4.20
2. The workshop's objectives were achieved.	0	4	1	5	10	4.05
3. The workshop satisfied my professional needs in this area.	2	0	8	8	2	3.40
4. The workshop's content was interesting.	0	2	0	15	3	3.68
5. The facilities provided a suitable environment for training.	0	0	0	4	16	4.45
6. The trainer(s) was/were effective.	4	2	2	8	6	3.45

The rating for number 1 is calculated as the following:
(0 x 1 = 0) + (0 x 2 = 0) + (2 x 3 = 6) + (12 x 4 = 48) + (6 x 5 = 30) = 84
84 / 20 = 4.20

The technique for calculating ratings on customized reaction forms is the same, but you are given the ability to rate individual aspects or the entire component. The following are the results of twenty participant responses for a single session of an example training program.

Figure 5.9

Session 2: Human Rights according to the United Nations		Negative 1	2	3	Positive 4	Rating
1.	Organized	0	3	13	4	3.05
2.	The organization helped facilitate discussion between trainees	0	5	9	6	3.05
3.	Session time was adequate	6	3	9	2	2.35
4.	Content of the session was appropriate	0	3	3	14	3.55
					Overall Rating	3.00

The individual aspect rating value of 3.05 for number 1 is calculated as shown previously, and the overall rating for the session is calculated by adding each individual aspect value together and then dividing by the number of aspects (4).

Overall Rating = (3.05 + 3.05 + 2.35 + 3.55) / 4 = 3.00

The purpose of calculating the overall or individual ratings is to discover the general perception of the trainees for that specific training session. Next, you are able to compare the ratings to your NGO's standards to determine if the rating is acceptable or not. If your NGO does not have standard rating levels, then the initial results can become standards for future training programs.

The following are steps for organizing responses to open-ended questions:

- List each Unique Comment – Create a list to record each unique comment for each open-ended question from the received reaction forms. Record each unique comment on a separate line.

- Count the Frequency of Unique Comments – Once a unique comment is recorded, tally the number of times other trainees repeat the same comment. Write the number in parentheses ( ) next to the comment. For presentation of the comments, it is best to list the comments in the order of highest to lowest frequency.

1. How did the training exercises help with your understanding of the present concepts?
• They opened doors for discussions with our participating colleagues. (5) • They encouraged the spirit of team work. (4) • Through the exercises we were introduced to new points of view. (3) • Exercises helped in consolidating the concepts and the understanding of them. • They provided additional information.

Present the results of the reactions by doing the following:

- Create a Summary Reaction Form based on your original reaction form
- Add rating columns to the Reaction Form
- Tally and display all responses for each question or aspect
- Calculate individual aspect and overall ratings
- Organize all comments to questions for free response according to their frequency
- Refer to Example 5.1 "Reaction Form – Customized – Summary"
- Refer to Example 5.2 "Reaction Form – Standard – Summary"
- Refer to Template 5.4 "Reaction Form – Customized – Summary Template"
- Refer to Template 5.5 "Reaction Form – Standard – Summary Template"

5.3.3 Conducting Face-to-face Interviews or Discussion Groups

In some training scenarios, reaction forms may not be appropriate due to the training conditions (i.e. location) or characteristics of the trainees (i.e. illiterate populations, children…etc.) so other techniques are needed to obtain the trainees' reactions. The primary, non-paper based methods are:

- Face-to-face interviews
- Discussion groups

For both methods, the patterned interview technique should be used to ensure data consistency and ease of data collection. The following are the core components of a patterned interview:

- Pre-determined (written) questions with selection choices or open-ended questions
- An interview form with all pre-determined questions used to record the trainee's comments
- The interviewer should ask all pre-determined questions to each trainee
- The trainees' responses to open-ended questions should be recorded as precise as possible

The following are suggestions for conducting face-to-face interviews with trainees:

- Design an interview form using the same principles as a written reaction sheet (Sec. 5.3.1)
- Record each trainee's responses on an individual interview form giving the trainee an interview number
- Analyze the interview forms in the same manner as written reaction sheets (Sec. 5.3.2)

The following are suggestions for conducting discussion groups:

- Create only open-ended questions
- Categorize the questions by training component (training objectives, training content, trainers, facilities, logistics…etc.)
- Appoint a facilitator who is NOT involved in any aspect of the training project to conduct the discussion
- Appoint a note-taker to record the trainees' comments
- Create a categorized question guide for the discussion group facilitator.
  - Refer to Example 5.3 "Discussion Group Guide – Reaction"
- Create a note-taking template for each question and sufficient room to record comments.
  - Refer to Example 5.4 "Discussion Group Notes – Reaction"
- Ensure participation from all trainees during the discussion. Some trainees will need to be asked directly for their comments
- The discussion should take between 30 minutes to 1 hour depending on the number of trainees
- Analyze the responses for each open-ended question as described in section 3.2

5.3.4 Timing the Collection of Reaction Data

The optimal collection times for trainee reactions are the…

- Middle of the training program
- End of the training program

Collecting reaction data at the middle of the training program provides the program administration an initial picture of the trainees' satisfaction level and relevance of the ongoing training. This allows *modifications to be introduced* into the training if the initial reactions display weaknesses.

Collecting reaction data at the end of the training program provides the opportunity to measure the impact of introduced modifications, if applied, and to obtain the trainees' final satisfaction level and overall relevance of the training.

Determination of the appropriate collection time of reaction data is affected by the total length and design of the training. For one-time short training events (1 or 2 day events), collection during the middle is not appropriate but for longer (2 weeks or longer) training programs it is essential. For short training events which will be repeated over a longer time period with different groups of trainees, the results of the end of the training event collection should be handled as middle of the training results. The results will provide you with the opportunity to modify any aspect of the training before the next training event.

Review the total time length and structure of the training program, and then determine the appropriate times for collecting trainees' reaction data.

Suggestions for collecting reaction data

- Collect reaction data after each formal event, workshop or seminar
- Collect reaction data at the end of each training program phase
- Collect reaction data at the middle of the training program to evaluate the first half
- Collect reaction data at the end of the training program to evaluate the overall training program

5.3.5 Managing the Results

The analysis of the reaction data will display if the trainees' satisfaction level and the relevance of the training are acceptable or unacceptable. For both situations formal documentation should be completed by the training administration.

Action steps for "acceptable" results

- Training administration reviews the reaction data summary reports
- Training administration verifies and signs that all results are acceptable
- Reaction data summary reports are filed in the training program master file

Action steps for "unacceptable" results

- Training administration reviews the reaction data summary reports
- Training administration specifies which unacceptable components need modification
- Training administration approves interventions for each unacceptable component (for continuing or reoccurring programs)
- Input the approved interventions into the "Intervention Tracking Form" for follow-up (for continuing or reoccurring programs)
  - Refer to Example 5.5 "Intervention Tracking Form"
  - Refer to Template 5.7 "Intervention Tracking Form"

5.3.6 Tips for Measuring Reaction

- Create a reaction or patterned interview form that provides maximum information and takes the minimum amount of time to complete.
- Require the trainees to complete the reaction form or interview before they leave.
- Attempt to obtain 100% response from the trainees so reliable results can be determined.
- Do NOT request names.
- Complete reaction analysis promptly so interventions can be undertaken if required.
- Consider the trainees an important source of information!.

5.4 Evaluating Learning Development (Level 2)

The primary objective of any training program is to deliver knowledge, develop skills or change attitudes. This is the foundation from which change in behavior starts, so it is imperative to evaluate the degree of knowledge transferred to trainees. This section provides methods and tools for assessing the learning within training trainees. The methods include the following components:

- Learning evaluation before and after the training program
- Tools for evaluating learning before and after (pre & post self-assessments, pre & post tests, standardized tests, performance testing techniques and training exercises)
- Tips for evaluating learning

5.4.1 Evaluate Learning Levels Before and After

The most effective way to evaluate learning development is to evaluate learning levels before and after the training program. The difference between the before and after levels displays the extent of learning that occurred. This technique is used in situations where trainees have prior exposure to the training topics. If the topic is new then other techniques should be used.

5.4.2 Pre and Post Trainee Self-Assessments

This technique allows the trainee to rate his or her knowledge level for each knowledge area to be covered in the training. This tool has three primary components:

- Knowledge/skill level scale with definitions
- List of knowledge areas to be covered in the training
- An analysis form to show before and after results

Figure 5.10 is an example of a trainee self-assessment used for a training workshop developing skills for creating social issue documentaries.

Figure 5.10 Before and After Trainee Self-Assessment

Trainee Knowledge/Skill Level: Self-Assessment
F = Unaware/Unskilled
D = Minimal awareness/Rudimentary skill
C = Partial Knowledge/Semi-skilled
B = Working knowledge & skill level
A = Expert knowledge/Highly skilled

Instructions: For the following training topics mark your level of knowledge:

Training Topics		F	D	C	B	A
1.	Film research					
2.	Interviewing – structuring an interview					
3.	Technical sound operation					
4.	Lighting					
5.	The role of civil society					

On the *first day*, before any training begins, the trainees are asked to mark their current knowledge/skill level. The responses would then be tallied for each skill level to show the pre-training levels for each training topics. The same form is then presented to the trainees on the *last day*; after all training is completed, for completion again. As the after training responses are tallied, comparison between the first and last day learning levels can occur.

Important note – It is not necessary for the trainees to provide their names. This will ensure honest responses.

In Figure 5.11, you can see an analysis form that shows both the pre and post-program responses of twenty trainees. The analysis form allows the trainer or the administration to set objectives for the percentage of trainees to reach a desired knowledge/skill level by the end of the training. For each training topic the "% Attained" is calculated for the pre and post-program responses based on the stated training objective.

Figure 5.11 Analysis Form for Before and After Trainee Self-Assessment

Trainee Knowledge/Skill Level: Self-Assessment

F = Unaware/Unskilled
D = Minimal awareness/Rudimentary skill
C = Partial Knowledge/Semi-skilled
B = Working knowledge & skill level
A = Expert knowledge/Highly skilled

Training Objective

At least 85% of trainees at the B level or better in each of the key topics by the end of the course

Training Topics			F	D	C	B	A	% Attained
1.	Film research	Pre	0	5	5	9	1	50%
		Post	0	0	3	14	3	85%
2.	Interviewing – structuring an interview	Pre	0	4	11	5	0	25%
		Post	0	0	5	11	4	75%
3.	Technical sound operation	Pre	4	5	6	3	2	25%
		Post	0	10	4	4	2	30%
4.	Lighting	Pre	2	8	7	3	0	15%
		Post	0	3	8	9	0	45%
5.	The role of civil society	Pre	0	3	10	3	4	35%
		Post	0	0	3	13	4	85%

If the focus of the training program is attitude change, this technique can be easily applied to show the difference in particular attitudes between start and finish.

Refer to Template 5.8 “Pre-Self-Assessment”, Template 5.9 “Post-Self-Assessment”, Template 5.10 “Pre Post Self-Assessment Analysis” for future modification and use.

5.4.3 Pre and Post Tests

Written tests developed for the specific training topics can also be effective measuring techniques. The comparison between the initial and final scores will display learning development. In this scenario, the aim is not the determination of successful completion or not but the measurement of learning.

There are various ways of implementing this technique:

- Trainees complete the test and the trainer scores it – a final score comparison is facilitated by the trainer.
- Trainees complete the test without initial scoring. On the final day, the trainer provides the trainees with their initial test and requests them to correct it themselves, adding or removing information. This is especially effective for tests of open-ended questions.

Note – have the trainees use a different color ink to correct the initial test so the corrections are clear. The amount of correction will display the amount of learning to the trainee and trainer.

5.4.4 Standardized Tests

At the end of the training program, a standardized test encompassing all training topics can be used to measure the knowledge of the trainees. This technique is appropriate for training programs that result in formal certification or selection of trainees for further training.

The following are characteristics of standardized tests:

- Designed for specific knowledge areas by the NGO, an independent body or the trainer
- Scored by the trainer without trainee interaction
- A minimum score of success is needed for successful completion
- Administered at the end of the training program

5.4.5 Performance Tests to Measure Skills

If the objective is the development of particular skills then a performance test is needed during the program. The aim is to evaluate the trainee's ability to perform the specific skill.

The following are essential components in performance testing:

- Create a checklist of required aspects for direct observation
- Use established standards of performance (if available)
- Conduct Pre and Post tests

There are various forms of checklists, Figure 5.12 shows a portion of a quality-assurance checklist for interpersonal communication used in a HIV-AIDs project. For the entire checklist refer to Example 5.6 "Checklist – Interpersonal Communication – HIV AIDs". In addition, Template 5.11 "Direct Observation Checklist – Format 1" and Template 5.12 "Direct Observation – Format 2" are available for future modification and use.

Figure 5.12 A portion of a quality-assurance checklist

No.	Quality-assurance Questions	Yes	No
1	Was the place as cool and airy as possible?		
2	Was the audience sitting comfortably on seats or mats, for indoor meetings, or sitting under shade, for outdoor meetings?		
3	Was the audience arranged in a horseshoe, within 5 meters from presenters for lectures or discussion and within 7 meters for participatory activities?		
4	Were there at least 10 people in the audience, excluding the presenter/facilitator(s)?		
5	Did the presenter/facilitator(s) talk loudly enough for the audience to hear?		

5.4.6 Individual and Group Exercises

The following are activities which can be incorporated into the training as a means to measure both knowledge and performance development:

- Recorded exercises–video or audio recording
- Teach–back opportunities – the trainees are required to teach a previously covered topic
- Role–play modeling and feedback – specific scenarios are created and the trainees must perform accordingly
- Games–the trainees are provided games which require the use of the training topics

In order to maximize these techniques, checklists with pre-determined aspects should be prepared and used while the trainees engage in the activities to capture the results in a quantifiable manner.

5.4.7 Managing the Results

The analysis of the learning evaluation tools and techniques will display if learning occurred or not as a result of the training. For both situations formal documentation should be completed by the training administration.

Action steps when learning "occurred"

- All learning analysis documentation is reviewed by the training administration
- The training administration signs the analysis documentation verifying the results
- File all learning analysis documentation in the training program master file

Action steps when learning "did not occur"

- All learning analysis documentation is reviewed by the training administration
- The training administration determines reasons why learning did not occur
- The training administration approves interventions for the training program (for continuing or reoccurring programs)
- Input the approved interventions into the "Intervention Tracking Form" for follow-up (for continuing or reoccurring programs)
  - Refer to Example 5.5 "Intervention Tracking Form"
  - Refer to Template 5.7 "Intervention Tracking Form"

5.4.8 Tips for Evaluating Learning

- Attendance does NOT equate to learning development!
- Use more than one method to measure learning.
- Select the appropriate measuring techniques based on your training content and the trainees' profile.
- Attempt to obtain 100% response from the trainees so reliable results can be determined
- Be creative, and always try to quantify the results.

5.5 Evaluating Behavioral Change (Level 3)

Once new knowledge is acquired through training, it is necessary to evaluate its application in the workplace, personal life or community of the trainee. The aim of this section is to provide practical methods and techniques to answer questions such as "What happens after training? Will they continue to do what they did prior to training or change?" The following components are contained in this section:

- Required time length for behavioral change
- Evaluating before and after behavioral patterns
- Techniques for measuring behavior
- Presentation of behavior data
- Challenges and tips in evaluating behavior

5.5.1 Determine Appropriate Time Length after the Training

- Understand that opportunities for applying new behavior may be immediate, but usually require time.
- Allow 2 to 3 months after the training before collecting behavioral data.
- Determine a set time length in which behavioral data will be gathered following the training.

5.5.2 Evaluate Behavior Before and After

- A pre-training behavior questionnaire should be developed and sent to the trainees for completion in conjunction with a post-training questionnaire. This is the best technique to display the degree of behavior change, but implementation of this depends on adequate time between trainee selection and the start of the program.
- Alternatively – A post-training interview or survey can be used to identify behaviors that were different than prior to the training.
- Post-training behavioral data collection and analysis should be repeated a number of times during a pre-determined time period following the training to provide sufficient opportunity for behavioral change to be observed.

To provide the clearest picture, an evaluation should acquire responses from more than one of the following sources: trainees, their supervisors, their peers, their neighbors, their direct reports and their beneficiaries.

The following are considerations for selection of sources:

- Qualified – Are they able to provide accurate information based on the amount of time he or she spends with the trainee?
- Reliable – Will he or she provide true or distorted picture of the trainee?
- Availability – Depending on desired technique (survey, interview…etc.) will he or she be available?
- Number of sources – Obtain more than one source of information. Data only from the trainee is not sufficient for reliable results!

5.5.3 Techniques for Evaluating Behavior

1. Surveys and Questionnaires

Questions with selection choices and open-ended questions asked to managers, colleagues, family members, community members, primary beneficiaries or anyone who observes the behavior of the trainee.

- Refer to Template 5.13 "Post-Program Survey – Trainee"
- Refer to Template 5.14 "Post-Program Manager or Colleague"
- Refer to Example 5.7 "Post-Program Survey Questionnaire – Trainee"
- Refer to Example 5.8 "Post-Program Survey – Trainee"
- Refer to Example 5.9 "Post-Program Survey – Manager or Colleague"

2. Observation and checklists

The action of direct observation of the trainee by someone using a determined set of behavior standards for assessment.

- Refer to Example 5.6 "Checklist – Interpersonal Communication – HIV AIDs"
- Refer to Template 5.11 "Direct Observation Checklist – Format 1"
- Refer to Template 5.12 "Direct Observation Checklist – Format 2"

3. Work reviews (if the trainee is an employee)

Review of the trainee's work without his or her knowledge.

4. Interviews, focus groups and discussion groups

Structured questions to individuals (interviews) or groups (focus groups) to ask about the application of behaviors. Use a patterned questionnaire for both interviews and focus groups so qualitative and quantitative data can be gathered.

- See Template 5.15 “Patterned Interview”
- See Example 5.10 “Discussion Guide - Qualitative Research Training”

5.5.4 Presenting Behavioral Change Findings

- Pre and post-program survey results can be presented side by side for each evaluated topic. It is preferable to place the post-training result prior to the pre-training result as shown in Figure 5.13

Figure 5.13

Focus and importance given after the program compared to focus and importance before the program

Technical Components		Much more	Some more	The Same	Some Less	Much Less
1.	Documentary 3 – act structure	25, 12	70, 65	5, 14	0, 0	0, 9
2.	Film research	22, 17	56, 39	22, 39	0, 0	0, 5
3.	Character development	35, 14	58, 58	7, 23	0, 0	0, 5
4.	Pitching the story	21, 9	53, 53	26, 30	0, 0	0, 7
5.	Interviewing	21, 7	50, 42	28, 36	0, 0	0, 12

- Patterned interview results should display the percentage amount of selection for each choice and organized lists of responses by frequency for open-ended question (refer to Sec. 5.3.2)

Figure 5.14

1. What specific principles, concepts and behaviors did you learn during the training?

- Importance of structured interviews (40)
- Film research techniques (32)
- Character development techniques (15)

2. When you completed the program, how eager were you to apply the principles in your work?

85% Very eager 10% Quite eager 5% Not eager

3. How well equipped were you to do what was suggested?

90% Very 5% Quite 0 Little 0 None

- Checklists or work reviews can use the same presentation technique as patterned interviews for questions with selection choices or open-ended questions

5.5.5 Managing the Results

The analysis of the behavioral change tools and techniques will display if practical application occurred or not after the training. For both situations formal documentation should be completed by the training administration.

Action steps when practical application “occurred”

- All behavioral change analysis documentation is reviewed by the training administration
- The training administration signs the analysis documentation verifying the results
- File all behavioral change analysis documentation in the training program master file

Action steps when practical application “did not occur”

- All behavioral change analysis documentation is reviewed by the training administration
- The training administration determines and documents the reasons why behavioral change did not occur
- The training administration documents recommendations for how to improve future behavioral change
- File all behavioral change analysis documentation in the training program master file

5.5.6 Challenges of Evaluating Behavior

- Determining the time period after the completion of the training to start the evaluation activities.
- Ensuring participation of trainees due to time period after the training.
- Justifying the necessity of the evaluation activities within your NGO.
- The financial resources needed to complete the evaluation activities.

5.5.7 Tips for Evaluating Behavior

- Include a behavior questionnaire with the training description and invitation prior to the training.
- Attempt to obtain 100% response from the trainees so reliable results can be determined.
- More than 1 source of observed behavior is needed for each trainee!
- Include these post-program evaluation activities in the training budget or they will NOT HAPPEN!

5.6 Evaluating NGO/Community Results (Level 4)

The aim of this process is to measure if the NGO or community objectives were achieved as a result of the application of knowledge in the form of new behaviors. This section provides the practical methods and techniques to determine the results on the NGO/community. The following components are included:

- Determination of NGO/Community objectives
- Required time length for NGO/Community results
- Before and after NGO/Community evaluation
- Presenting NGO/Community findings
- Tips for evaluating NGO/Community results

5.6.1 Determine Clear Objectives

- Level 4 results focus on the high-level objectives or expectations of the stakeholders for the training program (i.e. reduced HIV infection rates, increased usage of water conserving irrigation methods, empowerment of women…etc.).
- Determine these by reviewing the training needs assessment, donor requirements; community needs assessments or by other direct feedback methods with stakeholders.
- Determine meaningful measurements for each training objective (i.e. 80% of submitted proposals are awarded, 10% decrease in over-budget projects, 10% decrease in HIV infection rates within women ages 16-20…etc.).

5.6.2 Determine Appropriate Time Length after the Training

- As discussed for Level 3, adequate time must be given for the NGO or community results to occur prior to starting evaluation activities.
- Determine an appropriate time length before collecting the post-program data.Time lengths can vary; some results might need 6 months and others longer.

5.6.3 Evaluate NGO or Community Results Before and After

- Collect pre-training data for each level 4 training objective measurement from either available data sources or develop data collecting tools to gather unavailable data. Once all previous levels of evaluation (1-3) are completed and the appropriate time length has elapsed, collect the post-training data for each level 4 training objective measurement. The analysis of the pre and post data will display if the level 4 results were successfully achieved or not.

- Available data sources
  - Internal NGO data – Any routinely collected organizational data, metrics, departmental reports or programmatic statistics.
  - Community data – Any reported (one-time or repetitive) data which provides information about the targeted community, population or geographical area.

Figure 5.15

Examples of Available Data Sources	
NGO Internal Data	Community Data
Operational costs data	Internally conducted research – community needs assessments, training needs assessments, focus groups, surveys, completed projects' results...etc conducted by your NGO.
Income data	Ministry reports – national and local reports published by various ministries (Health, Statistics, Education, Agricultural, Environment...etc.).
Projects' budget vs. cost data	International organizations reporting – findings and statistics reported by international organizations (IMF, World Bank, WHO, UNICEF...etc.).
Projects' summary information – total number, classifications, status...	Other NGO published research – published findings from other NGOs working within the same community or targeted population.
Projects' proposal data - # submitted vs. # awarded	
Human resource statistics	

- Unavailable Data Sources
  - Gather data – If the data is not available for the training objective measurements, use any of the previously discussed data collecting tools (questionnaires, interviews, discussion groups or surveys) to compile the pre and post data. In some cases, level 4 aspects can be combined with level 3 data gathering techniques. Figure 5.17 is an example of a behavioral questionnaire (Level 3) which contains one question (number 3) requesting NGO change (Level 4) information.

5.6.4 "Request of Validation" from Stakeholders

Since level 4 results are of primary importance to the training program stakeholders (managers, donors, community leaders...etc.), sometimes it is beneficial to request their feedback regarding the value of the training. This will provide important qualitative information for the final evaluation report (sec. 5.7).

The following are common techniques for "requests of validation":

- Face-to-face interviews
- Discussion groups
- Focus groups
- Surveys and questionnaires

Each of these techniques should be developed as previously explained while being tailored for the specific stakeholders. Figure 5.16 displays patterned interview questions for managers of employees who participated in a proposal writing skills training program.

Figure 5.16 Request of Validation – Patterned Interview Questions

1. How have your employees benefited from the proposal writing skills training program they participated in?
2. To what extent has the overall ability within your proposal writing team increased since the conclusion of the training program?
3. What are your impressions and opinions regarding the training program your employees participated in?
4. Would you send the remainder of your proposal writing staff to the same training in the future?

5.6.5 Presenting NGO or Community Results

Previously covered presentation techniques for prior evaluation levels can be applied to present the NGO/Community results. Pick the appropriate presentation technique based on the type of evaluation data gathered.

5.6.6 Managing the Results

The analysis of the NGO/Community data tools and techniques will display if the expected results occurred or not. For both situations formal documentation should be completed by the training administration.

Action steps when results "occurred"

- All NGO/Community results analysis documentation is reviewed by the training administration
- The training administration signs the analysis documentation verifying the results
- File all NGO/Community results analysis documentation in the training program master file

Action steps when results "did not occur"

- All NGO/Community results analysis documentation is reviewed by the training administration
- The training administration determines and documents the reasons why NGO/Community results did not occur – based on Level 1 to Level 3 outcomes and any other factors
- The training administration documents recommendations for how to improve future NGO/Community results
- File all NGO/Community results analysis documentation in the training program master file

5.6.7 Tips for Evaluating NGO or Community Results

- Determine and clarify the NGO/Community objectives with stakeholders during the design phase. All other levels are built upon these objectives.
- Ensure pre and post-program data sources will be available for comparison.
- Ensure the training budget includes activities for level 4 data gathering if needed.

Figure 5.17

Name:

Please respond to the following questions in preparation for the one-day leadership development follow-up session. In addition to helping you prepare for this session, your responses will help us to better understand how you have applied what you learned.

1. What are you doing differently as a result of what you have learned from leadership development?

____

____

____

____

2. Have these actions improved:

a. Your effectiveness as a leader? Yes ______ No_____ Not sure _____

b. Your team's effectiveness? Yes ______ No_____ Not sure _____

c. Your NGO's performance? Yes ______ No_____ Not sure _____

3. If you feel that your actions have improved effectiveness, please indicate in what areas

a. Productivity _____

b. Employee engagement _____

c. Quality of work _____

d. Decision-making _____

e. Clarity about priorities _____

f. Communications _____

g. Collaboration _____

h. Time to complete projects _____

i. Other: _________________________

4. What other benefits have you, your team, and/or the NGO realized so far from leadership development?

____

____

____

____

5.7 The Final Evaluation Report

The aim of this process is to create a clear and logical presentation of the evaluation results from each evaluation level; Level 1, Level 2, Level 3 and Level 4. This presentation will display the "chain of evidence" (sec. 5.1.4) which validates the success or failure of the overall training objectives.

5.7.1 Present Quantifiable Results for Each Evaluation Level

- Level 1: Reaction example results:
  - 95% of trainees (n=100) agree that the exercises were relevant to their situation.
  - 89% of the trainees (n=95) will use the skills in their daily activities.

- Level 2: Learning Development example results:
  - 90% of the trainees (n=50) received a passing score on end of training certification test.
  - 90% of the trainees (n=52) recorded their level of knowledge for interviewing skills at a "B" (Working knowledge or skilled level) or higher on the post-training self-assessment.
  - Trainee application of skills and knowledge during training individual and group activities displayed knowledge transfer.
  - 80% of the trainees (n=55).

- Level 3: Behavioral Change example results:
  - 5 out of 5 program management skills improved over pre-training measurements.
  - The average amount of times which parents bathe their children increased from 1 to 3.
  - Filmmakers' attention on the film research phase of development increased 13% from pre-training measurements.

- Level 4: NGO or Community Results example results:
  - 10% reduction in reported cases of dysentery in areas that received training.
  - 15% increase of the number of community groups started.
  - 5% increase of successful proposal submissions.

5.7.2 Present Qualitative Results for Each Evaluation Level

- Include statements from trainees' surveys or interviews.
- Include statements from other sources (peers, managers, community members…etc.)
- Include statements from the "request for validation" from stakeholders (refer to sec. 5.6.4).

Refer to Template 5.16 "Final Evaluation Report" for future modification and use.

5.7.3 Manage the Results

Once all quantitative and qualitative results for each level are compiled into the final evaluation report, successful or unsuccessful achievement of the overall training objectives (Level 4) will be apparent for all stakeholders. At this point, it is vital for the training administration to display to the stakeholders the role which the training program played in the final results.

Scenarios of "successful" achievement

- Present how good execution of the program (Level 1) enabled positive learning opportunities (level 2) which in turn resulted in on the job or in daily life application (level 3) improving either the NGO or targeted community (level 4)

Scenarios of "unsuccessful" achievement

- Clearly document all factors of non-achievement and categorize them as controllable or uncontrollable
- Define the reasons surrounding all controllable factors, and provide recommendations for improvement
- Define the reasons surrounding all uncontrollable factors, and justify why they are considered uncontrollable

Note Some factors affect overall achievement but are not direct training factors. For example, level 4 objectives may not have been achieved because the NGO management style did not allow their employees to apply their newly acquired information. In the scenario in which overall objectives were not achieved because of uncontrollable factors, present the entire evaluation "chain of evidence" up to that point displaying the value of the training program.

5.7.4 Tips for Final Report Writing

- Provide both quantitative and qualitative data.
- Provide results for each determined training objective for all evaluation levels.
- Use bullet points to display the results.
- Use narrative writing only to explain special scenarios or factors.
- Use concise and simple language.
- Display the links between Level 1, 2 and 3 results within the overall results in level 4.
- Clearly explain the role of the training in either the overall successful or unsuccessful achievement of the objectives.

5.8 Reporting on Training Programs

5.8.1 Effective Reporting

This section presents the foundational components and structure required for effective communication to stakeholders about a recently completed training program. It provides practical steps on how and to whom to report a training program's results.

While a training program's content or design may yield effective results, if these are not presented to the appropriate audiences in a clear manner the extent of the program's success may not be fully appreciated. The primary components presented within this section are the following:

- Required Information for Report Creation
- Training Program Stakeholder Review
- Developing a Training Program Report Template

1. Required Information for Report Creation

The following are the essential training program components needed for reporting:

Component	Purpose
• Training Program Need	Presents the context and need of the training program.
• Training Program Objectives	Presents the stated objectives by which success is measured
• Training Program Methodology/ Structure	Displays the structures (time period, phases, types of information delivery, assessment techniques...etc) which were employed to deliver the training to the participants.
• Materials and Resources List	List of materials and resources used within the program.
• Participant List	The finalized training participant list displaying attendance records and vital demographic information (position, organization, gender... etc) for each participant.
• Photographical Evidence	Pictures or video of the training activities, participants, trainers and required deliverables.
• Numeric Evidence	Quantitative results for all appropriate monitoring and evaluation levels (1-4) or vital program statistics.
• Story-Based Evidence	Quotes or stories from program staff, participants or beneficiaries concerning the program's results and impacts.

Each of these components should be available as a result of previous activities conducted prior to, during or after the training program as defined within the training program plan.

2. Training Program Stakeholder Review

Prior to reporting any aspect of the training program proper consideration of the program stakeholders and their information requirements should be completed.

The program stakeholders represent the primary audiences for which reporting will be undertaken. While there is common information required by all stakeholders, it is essential to understand the importance each stakeholder group places on different types of information. Understanding the differences between stakeholders' needs will enable you to produce more effective reporting for your target audience.

Figure 5.18 provides common stakeholders and their information requirements.

Figure 5.18

Stakeholder	Information Requirements
NGO Management	• Successful completion of stated objectives • Numeric evidence displaying that change or development occurred which resulted in a return on investment to the organization (Reaction, Learning, Behavioral and Organizational change) • Story-based evidence from participants and beneficiaries displaying the training impact
Direct Beneficiaries	• Story-based examples of organizational or community change that affects their daily lives • Photographical evidence that displays action
Donor Organizations	• Successful completion of stated objectives • Numeric evidence showing that change or development occurred (Reaction, Learning, Behavioral and Organizational change) • Story-based evidence from participants and beneficiaries displaying the training impact • Story-based examples of organizational or community change that affects individuals' daily lives • Photographical evidence that displays action
General Public	• Story-based examples of organizational or community change that affects individuals' daily lives • Photographical evidence that displays action

Consideration of the information requirements of different stakeholders will help focus the writing style, tone and examples used in the report.

3. Developing a Training Program Report Template

A training report template provides at structured format which can be applied to any type of training program and used for distribution to a variety of different stakeholders. The following are essential components for any training program report:

- Title Page
- Table of Contents
- Acronyms
- Body of the Report
  - Training Project Overview
  - Executive Summary
  - Training Objectives
  - Participants
  - Methodology and Resources
  - Evaluation
  - Success Stories
- Appendices

Provided below are the important data items and writing style aspects for each essential report component.

Title Page

- Training program name
- Time period of training program
- Date submitted
- Name of the person or organization submitting the report
- All required organization logos (donor and implementer logos according to all branding policies)
- Name of person or organization the report is submitted to
- Listing of all partnering organizations (if applicable)
- Copyright statement which includes the year and name of the submitting organization
- All rights reserved statement which includes a sentence that allows for reproduction with acknowledge of the source and a sentence stating the funding source of the program

Refer to the following examples of various title pages:

- Example 5.11 Title Page

Table of Contents

- Title
- Titles of all major report sections
- Page numbers for all major report sections

Refer to the following examples of various table of contents:
- Example 5.12 Table of Contents

Acronyms

- A list of acronyms used in the report with their associated meanings

Refer to the following examples of acronyms:
- Example 5.13 Acronyms

Body of the Report

A. Training Project Overview

- Start the body of the report on a new page
- One to two paragraphs in length
- Explain the context of the training program – mention the donor organization (if applicable) and the implementing organization
- Explain the need of the training program

B. Executive Summary

- 10% to 15% of the length of the entire report
- Independent (can be read on its own)
- A concise description of the implementation
- A concise description of major results including charts, graphs and/or statistical presentations
- 2 to 3 stories of success from participants or beneficiaries (quotes or success stories)
- 1 to 2 pictures of the training events and/or participants

C. Training Objectives

- A list of the training objectives communicated to the participants
- A list of the training objectives used as the guideline to develop the training program

D. Participants

- The total number of participants
- Disaggregating the participants based on predetermined criteria (gender, age ranges, geographical location, organization, skill levels or others)
- All unique characteristics or important descriptive qualities related to the training program should be mentioned
- Use the created training plan and attendance sheets as the primary source for participant information

E. Methodology and Resources

- Use the created training plan as the primary source for this section's information.
- Mention all working principles for which the training program design and implementation were based
- For each working principle provide explanation of how the principle was implemented during the training program and what tools were used
- Provide a description of the materials and resources created for or used within the training program

F. Evaluation

- Use the evaluation final report as the basis for this section's information
- Provide an overview of the monitoring and evaluation activities used for assessment
- Describe all quantitative and qualitative data findings (graphical or narrative) at each level of monitoring and evaluation with explanation of their associated impacts
- Provide a summary discussion of the monitoring and evaluation "chain of evidence" for which the final assessment is based

G. Success Stories

- Document within 1 or 2 paragraphs and with photographs, specific success stories which occurred as a result of the training
- Use direct quotes from participants or beneficiaries
- Provide at least one picture for each story
- Sources of potential success stories
  - Trainers
  - Training participants
  - Beneficiaries
  - Monitoring and Evaluation activities

H. Appendices

Appendices may contain raw detailed data, lists, templates or other tools that a reader might want to view to verify statements or findings presented within the body of the report. Items commonly included are:

- Participant lists
- Training plans
- Workshop or training agendas
- Skill assessment forms
- Questionnaire forms or structured interview questions
- Numeric data tables from which presented figures are based on

Refer to "Template 5.17 Training Report" for a formatted template which may be used as a basis for future training reports. The template includes all components, section headers and place holders for pictures as detailed above. You should customize the template to meet your branding and reporting requirements.

5.8.2 Tips on Writing Style

The following are points to remember as you write the training report[4]:

- Find a balance between depth and length of writing (keep reports less than 40 pages with additional materials in the appendices)
- Use of both "scientific" language and graphic narrative that captures and holds the interest of the reader. Use different ways to provide information, such as good quotes, small case studies in text boxes, and key data using clearly labeled data tables and charts
- The report must be credible and convincing to the stakeholders – it will be a primary tool used to detail the training results
- Make the report clear, concise, powerful and persuasive to the reader

5.8.3 Challenges in Report Writing

The following are points of challenge that are usually encountered when writing the training report:

- Compiling required information prior to writing, especially if multiple people were responsible for different aspects (plan ahead for the report writing from the beginning)
- The application of a writing style and language which provides clear factual information while creating a powerful picture for the general professional reader.
- Presenting the information in an adequate manner which addresses the needs of all stakeholders
- Controlling the length

4 Constructing an Evaluation Report, USAID, April 14, 2006, page 1.

5.8.4 Channels of Communication for Training Results

After the writing of the training report is completed appropriate channels of communication for disseminating the information need to be employed. This section provides you with the primary channels for communicating the training results to various stakeholders.

- Traditional Channels
- Community-based Channels
- Internet-based Channels

A good practice is to ask the stakeholders what their preferred channel of communication is, and then create a checklist of the preferred channels for all training project stakeholders. This provides a guide for all communications and a follow-up tool for tracking communications with the stakeholders. Refer to the following templates and examples for stakeholder preferences:

- Template 5.18 Stakeholders Communication Preference Record, Example 5.14 Stakeholders Communication Preference Record
- Template 5.19 Stakeholders Communication Preference Checklist, Example 5.15 Stakeholders Communication Preference Checklist

The following table displays various types of communication channels for common stakeholders.

Figure 5.19

Stakeholder	Example Channels of Communication
NGO Management	• Emailing the report softcopy, uploading the report to an organizational intranet location or saving the report to an organizational fileserver location accessible by NGO management • Hand-delivering a report hardcopy to NGO management offices • Conducting a report presentation with all NGO management
Direct Beneficiaries	• Conducting community group meetings, town hall meetings or round-table discussion groups
Donor Organizations	• Emailing the report softcopy • Hand-delivering the report hardcopy • Conducting a report presentation with responsible individuals

Stakeholder	Example Channels of Communication
General Public	• Uploading the report to the organization website for public viewing • Adding a link to subject-specific internet portals for the report • Publish results through local media channels (newspapers, radio, TV...etc) • Conducting community group meetings, town hall meetings or round-table discussion groups

1. Traditional Channels

Still today, the majority of stakeholder communication consists of traditional methods of information distribution.

- Hand-delivery of a hardcopy report
- Sending of a softcopy report by email
- Face-to-face presentations

The first two methods only require that a primary contact be agreed upon by both parties. Once the primary contact is established then the preferred method can be established.

For face-to-face presentations, a PowerPoint presentation summary of the training report should be created. When creating the PowerPoint presentation apply the same standards of slide creation discussed earlier in the training manual. This presentation summary should be submitted in addition to the training report to the stakeholder.

Most NGOs' management and donor organizations prefer to use one or more traditional channels of communication.

2. Community-Based Channels

When the stakeholders are individuals, specific communities or regional territories, focused channels of communication which are able to deliver the information to the desired group or area should be employed.

- Round-table discussion groups
- Community group meetings
- Town Hall meetings
- Local or regional media (newspapers, radio channels or TV channels)

For each type of community-based communication channels the training results should be extracted from the training report and presented in an appropriate manner based on the audience, communication method and location.

The following are key aspects to focus on when preparing for community-based meetings:

- Clearly communicated time and location of the meeting to the targeted audience (written and verbal techniques are encouraged)
- Facilitation of the meeting based on a pre-determined schedule
- Selection of a facilitator who has the ability to maintain the schedule and provide opportunity to both presenters and participants to give and receive feedback
- Provision of comfortable facilities for the participants
- Provision of a tested sound-system which will allow all participants to hear and be heard clearly
- Preparation of a visual presentation
- Preparation of written handouts for distribution to all participants

Community-based channels are primarily used when informing direct beneficiaries.

3. Internet-based Channels

When the stakeholders are the larger public then modern internet-based channels of communication provide opportunity for large amounts of information to be disseminated quickly and economically.

- NGO website
- Internet portals
- Other: Facebook, YouTube, blogs

For each internet-based option the entire training report or portions of the report can be used to communicate results.

The following are suggestions for using your NGO website:

- Create an individual page highlighting the training project
- Upload the training report to the training program site after obtaining all required authorizations and final verifications from the NGO management
- Add each success story with pictures to the training program site. These might need to be shortened in length for quick reading but make sure to inform the reader the full-length story is in the training report
- Create a gallery of pictures for the training program. Before uploading pictures of individuals make sure to obtain the consent of the individuals who are in the pictures

The following chart[5] provides guidance for when and how to obtain consent.

Consent NOT Needed	Obtain Verbal Consent	Written Consent Encouraged
Non-recognizable individuals in public (faces and other identifying features are obscured).	All individuals in all settings when possible.	Recognizable providers and clients in clinical settings.
Public figures in public (i.e. celebrities, VIPs at campaign launches)	Parents, guardians or teachers of children.	Recognizable or non-recognizable individuals in a setting where personal or private information is exposed in the photo or corresponding caption, such as: • Health status (HIV-positive, TB, diarrhea, etc.) • Health behavior (alcohol & drugs) • Criminal behavior (perpetrator or victim)

- Upload any video of clips of the training program for viewing.

Take advantage of internet portals or online social communities which focus on the same area of specialty as the training program. These provide an opportunity to promote the training program and forum to display the program's results and impacts.

- Add a link on the portal to your training program site. This is commonly done by registering an account with the portal or social community. If registration is not available, contact the hosting organization to inquire about conditions for adding links or information to their site.
- Add short summaries to the portal about your training program that include the major results.

5 Adapted from the http://www.photoshare.org/phototips/developethics.php

Display your training program's activities and results on both Facebook and YouTube. These online tools allow a wide variety of individuals the opportunity to view your NGO's achievements.

- Upload the training report, pictures and videos to your NGO's facebook page, if created
- Upload all videos of the training program to YouTube and link them to your NGOs' website and Facebook page, if applicable.

It is important to note that these internet-based tools can be used either at the end of a training program or continuously throughout the life of the training program for communicating activities and results. If your stakeholders prefer online forms of communication then your NGO might want to consider maintaining continual communication by way of these tools throughout all phases of the training program.

5.9 Media Reporting

In order to promote the training initiatives at the NGO, it is important to approach the media strategically, coordinate the message inside the NGO, and use resources and experiences in media relations in the most effective ways.

It is recommended that you coordinate with the PR/Communications Manager or communications contact person in your NGO for such promotion activities. In case the NGO does not have anyone who deals with PR/communications, the following section will provide you with a concise description of 3 ways to communicate with media:

1. Press Release: written text sent by fax or email to big number of media, usually after an event. Advantages: reaches big number of media in short time. Disadvantage: there is no possibility for reporters to engage in conversation with the authors.

2. Backgrounder: written material provided either as an addition to press release and interview, or distributed independently. Sometimes it is called "fact sheet" or "Q&A Sheet".

3. Media Interview: interaction and discussion between you and reporter and, consequently, provides better in-depth analysis of the topic. Disadvantage: it can be given to one media outlet at a time.

1. Press Release

- Write it in the same format and structure as a news article, so that media can publish it as it is, without further editing. For example, write in third person. A release issued by NGO Better Life would say: "Better Life today organized first training session in a project to support orphans in Jordan".
- Have a catchy headline.
- Use the 'pyramid' form: the title and first paragraph tell the main news; important info is in the second and a quote in the third paragraph. End with a advertisement about your NGO.

- In the first paragraph, answer the five “W” questions about the training event: Who, What, When, Where, and Why/How?
- The quote can be by your NGO’s director, trainer, donor, or a respectable third party.
- Provide a catchy story so that your release is newsworthy for the media.
- Use double spacing and do not write more than two pages.
- Enclose a Q&A sheet with background information about the project and training.
- Include dateline, strong headline, your contacts (name, phone, email) for those who would like to get further information or schedule an interview. Use simple, understandable language, no jargon. Write in short sentences.
- After you send out the release, make calls to the reporters. Ask if they got it, if they understand it, and if they need additional information.

(NGO letterhead)
PRESS RELEASE

Contact: Ruba Hatami FOR IMMEDIATE RELEASE
Tel. 111/111-3333
Cell Phone 333/444-6667
Email: rubahatami@somewhere.com

MAIN TITLE OF PRESS RELEASE GOES HERE IN ALL UPPER CASE
Subtitle Goes Here in Title Case

Amman, June 21, 2010 – first paragraph first paragraph first paragraph first paragraph first paragraph first paragraph first paragraph first.

body of press release body of press release body of press release body of press release body of press release body of press release body of press release body of press release body of press release body of press release body of press release body of press release body of press release body

Quote Quote
body of press release body of press release body of press release body of press release body of press release body of press release ress release body of press release body of press release

about the NGO issuing the release blurb about the NGO issuing the release blurb about the NGO issuing the NGO issuing the release blurb about the NGO issuing the release blurb about the NGO issuing the release
###
Notes for the editor:
- For more information, please call or email Ruba Hatami on the above phones and email address
- Integral training report and research findings are available on the webpage www.findmore.com
- Our office can arrange an interview with leading experts in the field. Please contact R. Hatami.
- Free of rights photo material available to download from www.findmore.com

2. Backgrounder

Backgrounder (also known as "fact sheet") is an excellent way to present facts, figures, quotes and additional sources on a training topic to the media. It should be put online on your NGO's website, placed in press kits, and included in training/conference handouts.

Backgrounders can be prepared in different formats such as "Fact Sheet" or "Q&A Sheet", "Frequently Asked Questions-FAQ", "Quote List", "Speech Highlights", or "Bio Sheet".

Tips for writing backgrounders

- Backgrounders need to be brief, readable, and easy to grasp
- Q&A format, bullets, and/or chronological listing are highly recommended. Best two or three pages long
- Mention additional sources on the issue: literature, websites, film footage or photo material available, etc…
- Mention your name, telephone, fax and email for those who need additional information

Let's say you are holding a media relations training for disability organizations, in the framework of a project that monitors Jordan's compliance with the UN Convention on Disabilities. Possible backgrounder could be about:

A. *The training:* who are the trainers, participants and its impact? The Training Manager can draft it.
B. *The project:* what is the convention about, who signed it, when Jordan signed it, how government reports on it, what are the aims of the project, project activities, timeline, etc. This should be drafted by the Program Manager.
C. *The issue:* disabilities in Jordan, facts and figures. Prepared by the Program Manager.
D. Combined backgrounder – combining the info on the training, project and the issue.
E. *Your NGO:* This one might exist already, if not your NGO's PR Manager should prepare it. If that person does not exist, discuss the issue with the NGO Director.

Example

http://www.hrights.eu/EN/Training_Offer_files/ReviewedAdvocacy%20training%20programmeHRights.pdf

A project backgrounder: about training for NGOs on the topic of effective communications with the EU. The backgrounder lists objectives, short bios of trainers, profile of participants, short program, methodology, and contact details for more info.

3. Media Interview

The basic rule is never to go to an interview before knowing why you go there and what you want to achieve. Decide what your message is. Try to focus on the big picture: the importance for the community of the skills delivered at the training; how will your project change the lives of the beneficiaries.

Before the interview

- If it is not possible to get the questions in advance, agree about the *topic* of the interview
- Find out from the reporter what he/she knows about the topic. If possible, brief him/her and send backgrounders and fact sheets on the topic
- Find out about the format of the show – Q&A, profile, reportage, news program or something else?
- Who are the *viewers/listeners*? So you can adopt and fine-tune your message to their language and interests. At what time is the show broadcasted?

Get prepared

- Decide on the key points to discuss
- Get ready for the subject; find examples, facts, stories and anecdotes for each point
- Think what could be controversial and difficult questions? How to answer?
- Exercise in front of the mirror and rehearse

During the interview

- Be concise. TV and radio do not like long sentences and in-depth analysis
- Use straight and simple language: not "owing to the fact that" but "because". Not "the fact that he had not succeeded" but "his failure". Do not use professional jargon
- Do not be afraid of silence. Long silence in the program is reporter's responsibility, not yours
- Bridging: In case of a question that you don't want to answer or in order to stay focused, try to "bridge" it to your key points. Example: "I am happy you asked me that question but it is even more important to emphasize that..." Example of bridging phrases: "Yes, and in addition to that." "I would like to add that." "The most important point to remember is", "Let me clarify", "This reminds me of", "Let me emphasize that", "The truth is", "This is a part of a larger issue"
- Stay positive. Keep friendly relationship with reporter
- Do not be afraid to admit if you don't know answer to a question. Promise to be back with it once you find it, and do so

After the interview

- Add the reporter to your media list
- Analyze the interview. What went wrong, and what was good
- If during the interview you promised additional information to the reporter, act immediately
- If the interview was in print media, collect the press clipping and archive it. If it was good, put it in your NGO newsletter, website or press kit

Documents & Templates

- *Training Evaluation Plan Tracking Form (Template 5.1)*
- *Training program Reaction Form (Template 5.2)*
- *Training program Reaction Form – Standard Smiley (Template 5.3)*
- *Reaction Form – Customized Template (Template 5.4)*
- *Reaction Form – Customized Summary Template (Template 5.5)*
- *Training Program Reaction Form (Template 5.6)*
- *Intervention Tracking Form (Template 5.7)*
- *Pre-Self – Assessment (Template 5.8)*
- *Post-self – Assessment (Template 5.9)*
- *Pre-Post Self Assessment Analysis (Template 5.10)*
- *Direct Observation Checklist – Format 1 (Template 5.11)*
- *Direct Observation Checklist – Format 2 (Template 5.12)*
- *Post-Program Survey – Trainee (template 5.13)*
- *Post-Program Manager or Colleague Survey (Template 5.14)*
- *Patterned Interview (Template 5.15)*
- *Final Evaluation Report (Template 5.16)*
- *Training Report (Template 5.17)*
- *Stakeholders Communication Preference Record (Template 5.18)*
- *Stakeholders communication Preference Checklist (Template 5.19)*
- *Reaction Form – Customized (Example 5.1)*
- *Reaction Form – Standard (Example 5.2)*
- *Discussion Group Guide – Reaction (Example 5.3)*
- *Discussion Group Notes Recording – Reaction (Example 5.4)*
- *Intervention Tracking Form (Example 5.5)*
- *Checklist – Interpersonal Communication- HIV AIDS (Example 5.6)*
- *Post-Program-Survey Questionnaire – Trainee (Example 5.7)*
- *Post- Program-Survey – Trainee (Example 5.8)*
- *Post- Program-Survey – manager or Colleague (Example 5.9)*
- *Discussion Guide – Qualitative Research Training (Example 5.10)*
- *Title Page (Example 5.11)*
- *Table of Contents (Example 5.12)*
- *Acronyms (Example 5.13)*
- *Stakeholders Communication Preference Record (Example 5.14)*
- *Stakeholders Communication Preference Checklist (Example 5.15)*

Annex One

Chapter One Templates

Template 1.1

Training Department Strategic Plan

Training Department Mission Statement

1. Training Department SWOT Analysis

Strengths	Weaknesses
Threats	**Opportunities**

2. Current Business Environment

Yearly NGO Priorities	Training Priorities/Strategies
•	•
•	•
•	•

Training Department Strategic Plan

3. Challenges/Implications

•
•
•
•
•

4. Training Needs Analysis Summary

Areas of Analysis	Findings
•	•
•	•
•	•

5. Action Plan

Strategies	Actions	Responsibility	Timeline					Expected Outcome	Measurement
			01	02	03	04	05		

Template 1.2

Job Description Format, Training Manager

Insert NGO Logo

JOB DESCRIPTION

Job Title	Training Manager
Department	Training
Report to (Direct)	
Report to (Indirect)	

Scope and General Purpose

Under the guidance of the NGO Director and within the limits of the NGO policies; oversee, direct and provide training & development opportunities for all employees in the NGO and local community.

Specific Duties and Responsibilities:

1. Develop annual Training Plan in alignment with training needs assessment and NGO's strategy
2. Facilitate training delivery through developing appropriate training material or identifying and recruiting internal or external trainers to complete the task. Deliver training when appropriate
3. Monitor training plan delivery through supervising training, staff enrolment and logistics
4. Evaluate the training events, using agreed methodologies, and report recommendations
5. Update the event calendar on monthly basis
6. Issue monthly progress report
7. Manage the training department team. Recruit department staff and complete an annual development plan
8. Maintain and update staff training database and share with head of department on quarterly basis
9. Develop and manage organization succession planning
10. Conduct periodic review of training department financial resources and report spending to finance manager on monthly basis
11. Conduct an annual training needs assessment based on agreed methodology (Optional)
12. Maintain department standards
13. Promote a culture of development and creativity
14. Etc...

Template 1.2

Job Description Format, Training Manager

Approval

This Job Description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees will be required to perform any other job-related duties assigned by their supervisor.

This document does not create an employee contract, implied or otherwise, other than an "at will" employment relationship. It is stressed that changes in business may require alterations to this job description.

Accepted by: ....

Signature: ....

Date: ....

Job Description Format, Training Coordinator

Insert NGO Logo

JOB DESCRIPTION

Job Title	Training Coordinator
Department	Training
Report to (Direct)	
Report to (Indirect)	

Scope and General Purpose

Under the guidance of the NGO's Training Manager and within the limits of the NGO policies; oversee, direct and provide training & development opportunities for all employees in the NGO and local community.

Specific Duties and Responsibilities:

1. Organize training venue and logistics (time table, printing training materials, training equipment)
2. Communicate training schedule to participants two days before the training event
3. Facilitate and oversee the maintenance of staff training records and history
4. Distribute and compile training assessment questionnaires at the end of each training event
5. Report feedback directly to Training Manger
6. Support trainers on training locations (trouble shooting, organize coffee breaks)
7. Manage volunteer program within the NGO
8. Etc...

Template 1.3

Job Description Format, Training Coordinator

Approval

This Job Description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees will be required to perform any other job-related duties assigned by their supervisor.

This document does not create an employee contract, implied or otherwise, other than an "at will" employment relationship. It is stressed that changes in business may require alterations to this job description.

Accepted by: ....

Signature: ....

Date: ....

Template 1.4

Job Specification Format, Training Manager

Job Specifications

Position: Training Manager

Area	Description
Education and Qualifications	A minimum of BSc in Human Resources Management, Business administration, training or any related fields, Fluent English
Experience	Previous NGO training experience (min 3 years)
Technical Competencies	Proficiency in using Microsoft applications
Behavioural Competencies	Developing others Leadership Understanding differences Community focus Problem solving Decision making Adaptability Teamwork
Personality / Interpersonal Skills	Approachable, amiable, independent, proactive, detail oriented, conscientious, assertive, active listener, cooperative, well mannered/polite, team player, respectful (i.e. cultures & differences)
Domestic	Willing to drive to assigned training project locations
Special Requirements	

Template 1.5

Job Specification Format, Training Coordinator

Job Specifications

Position: Training Coordinator

Area	Description
Education and Qualifications	A diploma in Education, administration or any related field
Experience	2-3 years in administrative position. Preferably with NGO.
Technical Competencies	Proficiency in using Microsoft applications Organizational skills
Behavioural Competencies	Time Management Developing others Understanding differences Community focus Adaptability Teamwork
Personality / Interpersonal Skills	Approachable, amiable, independent, proactive, detail oriented, conscientious, assertive, active listener, cooperative, well mannered/polite, team player, respectful (i.e. cultures & differences)
Domestic	N/A
Special Requirements	

Sample Competencies Framework (Mango - UK)

MANGO COMPETENCY FRAMEWORK
(Revised May 2006)
Mango is a registered charity & a limited company registered in England & Wales.

What is Mango's competency framework?

Mango recruits accountants and finance professionals onto its register that have the ability to be effective in relief and development contexts. This may be a proven ability or potential ability.

Mango uses a competency framework to help identify skills, abilities, qualities and attributes (i.e. competencies) that enable people to work effectively with relief and development organisations.

The competency framework is the central tool that we use throughout our recruitment processes. It helps to:

- Assess suitability - all register applicants are asked to read the competency framework to assess their suitability for NGO finance roles
- Complete the application form - the application form refers to the competency framework in detail. To complete the application form correctly and fully, applicants will need to refer to the framework
- Ensure satisfactory references - if accepted onto the register, we seek two professional references to validate an individual's experience. These references follow the competency framework
- Match agency needs - Agencies also use it to describe their precise staffing needs for specific positions

The framework allows us to make sure that the right people are put forward for the right jobs, fulfilling a critical part of Mango's activities. It comprises six broad areas of competency, which are:

A. Financial management
B. Computers and IT
C. General management
D. Other relevant competencies such as languages, logistics or business advice
E. Interpersonal skills
F. Understanding of humanitarian relief and development issues

Sample Competencies Framework (Mango - UK)

Specific components of each competency are rated on a scale of 1 to 5, as follows:

1. Basic working skills in some areas
2. Some theoretical knowledge and working skills in most areas
3. Good theoretical knowledge and working skills in almost all areas
4. Strong theoretical and practical experience of the whole competency
5. Capable of operating at the highest level in this competency; usually means at least 5 years direct professional experience and advanced theoretical knowledge

A. Financial Management Competencies

All members of Mango's register have some level of financial management ability. This covers a wide range of activities, which we divide into 5 sub groups of competencies.

1. Bookkeeping and cashiering:

- Basic cash handling procedures (including petty cash)
- Maintain accounts records (receipts etc.)
- Use payment and receipt vouchers
- Pay suppliers and staff salaries (in line with controls)
- Manage floats
- Manage bank accounts
- Maintain cashbooks
- Analyse cashbooks
- Close the books at month end

2. Implementing financial controls:

- Cash handling procedures
- Authorisation procedures
- Accounting controls (including reconciliations)
- Segregation of duties
- Develop financial systems/procedures
- Develop financial roles and responsibilities
- Audit financial controls and systems

3. Project/programme accounting:

- Cash flow management
- Bank account management
- Monitor accruals (committed expenditure)
- Manage suppliers and credit arrangements
- Asset management

Sample Competencies Framework (Mango - UK)

- Produce management reports
- Familiar with double entry book-keeping
- Produce month end submissions to head office
- Close the books at year end
- Multi-currency transactions
- Manage grants made to implementing partners
- Manage audit process
- Multi-project financial management
- Develop systems/procedures (inc. spreadsheets & roles/responsibilities)

4. Budgeting and budget monitoring:

- Prepare project budgets (with project staff)
- Monitor expenditure against budget
- Interpret budget monitoring reports for managers, and identify appropriate actions
- Set up accounts structures
- Flex and review budgets
- Manage multi-site budgeting process

5. Managing donor funding (financial aspects only):

- Prepare budgets in donor formats
- Monitor actual expenditure versus donor budgets
- Produce financial reports for donors
- Line by line monitoring of funding situation
- Set up systems for financial reporting to donors
- Manage multiple donor funding
- Liaise with donors' financial staff
- Ensure that external funding meets organisational requirements

B. Computer & IT competencies

The ability to use computers and information technology (IT) is almost indispensable for financial managers in the field. At times, knowledge of specific accounting packages is also required. Computer and IT skills are grouped into four areas of competency, as follows:

- Word-processing
- Spreadsheet skills
- Accounting software
- Other IT skills such as programming abilities and IT support

Sample Competencies Framework (Mango - UK)

C. General Management Competencies

1. Supervising and leading teams:

- Provide on-going direction and support to staff
- Take initiative to provide direction
- Communicate direction to staff
- Monitor performance of staff
- Motivate staff
- Staff succession planning
- Ensure organisation's standards are met (e.g. implementing head office procedures)

2. Recruiting and releasing staff:

- Prepare job descriptions and person specifications
- Participate in selection interviews
- Identify individuals' training needs
- Implement disciplinary and grievance procedures
- Ensure legal obligations are met (e.g. staff have appropriate contracts)
- Develop staff contracts
- Develop salary scales and remuneration packages
- Develop personnel management procedures
- Ensure staff resources meet organisational need

3. Training and developing people:

- Deliver training to junior non-financial staff
- Deliver training to senior non-financial staff
- Identify training needs
- Support personal development
- Develop training materials & methodology
- Train financial staff

4. Managing projects/programmes:

- Prepare detailed operational plans
- Manage financial and human resources
- Monitor overall performance against objectives
- Write reports, project proposals and amendments
- Understand external funding environment and negotiate with donors
- Develop project/programme strategy

Sample Competencies Framework (Mango - UK)

D. Other Relevant Competencies

1. Office administration:

- Implement office support systems (inc. filing, insurance, stationery, staff accommodation)
- Source office space & staff accommodation
- Implement and develop health and safety procedures
- Handle organisation's relationship with government
- Develop office support systems
- Manage office support staff
- Ensure office support resources meet organisational needs

2. Business advice:

- Provide business advice to small enterprises
- Provide business advice to medium size and large enterprises
- Design and implement a business advice programme
- Set up small enterprises
- Set up medium to large enterprises

3. Organisational development:

- Understand organisational issues in other cultures
- Understand principles of organisational development
- Develop organisational systems/structures
- Develop vision and strategy
- Manage organisational change to resolve specific issues
- Establish and develop an organisation

4. Stock control:

- Manage storage (warehouse)
- Manage associated paperwork (purchase orders, delivery notes, etc.)
- Develop logistics and storage systems
- Manage logistics/warehouse staff

Sample Competencies Framework (Mango - UK)

5. Other logistics:

- Source goods and services locally
- Arrange transport of goods
- Source and transport goods and services internationally
- Vehicle maintenance
- Manage customs procedures
- Negotiate improvements in supplier performance
- Ensure that logistics/storage resources meet organisational needs

6. Languages:

Mango operates in English, and strong working English is necessary for all members of the register. Other languages are a great advantage, allowing members to work in different parts of the world. French, Spanish and Portuguese are the languages most commonly requested by our NGO clients.

Mango rates language competency on a scale of 1 to 5, as follows:

1. Basic survival skills;
2. Able to communicate verbally, very basic reading and writing ability;
3. Good spoken ability, basic reading and writing ability;
4. Good all-round working ability/near fluent;
5. Fluent/native user.

E. Interpersonal Competencies

In addition to technical competence, Mango register members are also assessed on their interpersonal skills and abilities. Register members need to be very sensitive to individual and cultural differences if they are going to work effectively with aid agencies around the world. It is essential that register members demonstrate the ability to work in teams, with people from diverse cultural, economic, educational, ethnic, religious and social backgrounds.

Different placements make radically different demands on professional staff. Not all placements require all of the characteristics listed below. However, all placements require a mixture of an appropriate working approach, problem solving ability, and interpersonal skills.

Working approach:

- Attention to detail: Concentration on all aspects of a task, commitment to achieving high quality results
- Initiative: Can develop new solutions to problems as they arise

Sample Competencies Framework (Mango - UK)

- Flexibility: Flexible in working arrangements and adaptable to new (sometimes unstructured) working environments
- Ability to work in a team: Can work with others in order to reach common objectives
- Ability to manage oneself: Can define priorities in an unstructured environment, with many competing demands made on one's time

Problem solving skills:

- Able to approach problems in a creative and practical way and deal with problems as they occur.

Interpersonal skills:

- Tolerance: Able to manage diversity and adversity
- Resilience: Able to cope effectively with physical discomfort and emotional stress
- Culture/gender sensitivity: Aware of and sensitive to gender issues and different cultures; tolerant of others' views
- Personal and professional discipline: Able to maintain self-control and professionalism in stressful circumstances
- Listening/communication skills: Able to appreciate others' points of view, to listen and be attentive; able to communicate clearly and concisely

F. Understanding of Humanitarian Relief and Development Issues

Some knowledge of humanitarian relief and development issues is important for register members to be effective in their work. The level of competency is rated on a scale of 1 to 5, as follows:

1. Basic awareness of issues
2. Working knowledge of the NGO environment
3. Good theoretical knowledge from studies and reading
4. Good theoretical knowledge and working skills
5. In-depth knowledge of NGOs' context, including wider issues such as international relations or current debates on NGOs' governance and performance

Template 1.7

Recruitment Advertising Form

Job Opportunity with (insert NGO name)

The XX NGO empowers society, especially women and children aiming at improving the quality of life to secure a better future for all Jordanians.

Vacancy: Training Coordinator

Requirements:

- BA in Training, Business Administration or any related field
- Previous experience in training delivery
- Ability to work with stakeholder in the field

1. Submit resume in person to: (insert address and dates)
2. Or you can mail it to (insert mail address)

All resumes need to be submitted before (Month Day Year). Only shortlisted candidates will be contacted.

Template 1.8

Interview Assessment Sheet

Candidate Name	
Position applied for	
Department	
Interviewer	
Date	

Criteria	1	2	3	4	5
1. Friendliness	Appears very distant	Approachable, fairly friendly	Warm, friendly, sociable	Very Sociable and outgoing	Extremely friendly and sociable
2. Stability	Not at ease, appears nervous	Easily irritated	Average stability	Sure of himself	Extremely well com-posed, work well under pressure
3. Personality	Unsatisfac-tory for the job	Questionable for this job	Satisfactory for this job	Very desirable for this job	Outstanding for this job
4. Conversional Ability	Expresses himself poorly, talks very little	Tries to ex-press himself but does fair job at best	Average fluency and expression	Talks well and to the point	Excellent expression, extremely fluent, force-ful
5. Alertness	Slow to catch	Rather slow, requires more than average explanation	Grasps ideas with average explanation	Quick to understand perceives very well	Exception-ally keen and alert

Template 1.8

Interview Assessment Sheet

6. Experience	Background and job requirements not matching	Fair match between background and job requirements	Average match between background and job requirements	Very good match between background and job requirements	Exceptional match between background and job requirements
7. Drive	Has poorly defined goals and appears to act without purpose	Appears to set goals too low and put little effort to achieve them	Average goal setting with average efforts to achieve them	Appears to strive hard, has high desire to achieve goals	Appears to set high goals and strives to achieve them
8. Initiative	Never volunteers information of tasks lead	Rarely volunteers information	Seizes opportunity to enlarge responses and ask questions	Ask good questions and takes lead of conversation	Anticipates questions, well organized
9. Maturity	Immature in response and behaviours	Somewhat immature in response and behaviours	Adequately adult in reaction	Assertive non-egoistic and focused	Extremely mature in behaviours and views
10. Capacity for growth	Very limited	Limited	Sounds potential, needs guidance	Evident capability for growth	Strong potential for growth
11. Language	Very Poor language skills	Poor language skills	Average language skills	Good language skills	Excellent language skills
Overall Score					

Template 1.8

Interview Assessment Sheet

Technical Skills Summary:

General Comments:

Competency-Based Interview Sheet

Interview Summary

Candidate Name:______________________________ Position:______________________________

<table>
<tr><td rowspan="3">Competency (Examples)</td><td colspan="4">Ratings</td><td></td></tr>
<tr><td colspan="4">Interviewers</td><td>General Competency Comment</td></tr>
<tr><td>1st</td><td>2nd</td><td>3rd</td><td>Avg.</td><td rowspan="6"></td></tr>
<tr><td>Understanding NGO Operations</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Community Focus</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Understanding Differences</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Effective Communication</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Problem Solving</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Teamwork</td><td></td><td></td><td></td><td></td><td rowspan="6">Decision
☐ Shortlist
☐ Hired
☐ Suitable for Other Vacancies
☐ Not Suitable at All</td></tr>
<tr><td>Influencing Outcomes</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Managing Training Operations</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Adaptability</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Achieving Results</td><td></td><td></td><td></td><td></td></tr>
<tr><td colspan="4">Overall Score</td><td></td></tr>
</table>

Candidate Profile Areas	
Education & Qualifications	Notes: Meets Requirements: ☐ Yes ☐ No
Experience	Notes: Meets Requirements: ☐ Yes ☐ No
Knowledge & Skills	Notes: Meets Requirements: ☐ Yes ☐ No

1st Interview Date:____________ Interviewer:____________ Signature:____________

Comment:____

Template 1.9

Competency-Based Interview Sheet

2nd Interview Date:______________ Interviewer:______________ Signature:______________

Comment:____

3rd Interview Date:______________ Interviewer:______________ Signature:______________

Comment:____

Understanding Differences

Works effectively with people from different backgrounds / cultures & those having different viewpoints; consults & takes into account the cultures & viewpoints of others within their area of work; demonstrates impartiality towards individuals from diverse backgrounds when assigning work & handling work related issues.

Questions	Notes
1. Give me an example of a time when a person's cultural background affected your approach to a work situation. 2. Tell me about a positive situation when you worked with individuals from different cultures. 3. Tell me about the most difficult challenge you have faced in working co-operatively with someone who did not share your ideas, values or beliefs. 4. Describe a time in your work environment when you made an intentional effort to get to know someone from another culture.	

Competency-Based Interview Sheet

Questions	Notes
5. Tell me about a difficult situation you had to handle with someone who had special requirements or needs in respect of their culture or physical ability. 6. Recall a time when you did not take into account the ideas, values or beliefs of a team member, which affected their morale. What happened? 7. Tell me the steps you have taken to create a work environment where differences are valued, encouraged and supported. 8. Describe the way you handled a specific problem involving others with differing values, ideas or beliefs in your last job/current position.	

Effective Communication

Uses appropriate methods to communicate effectively & respectfully with people, regardless of their level, personality or background; keeps people informed of information; organises & runs effective team briefings; contributes to meetings in an appropriate way; works to resolve disagreements & conflicts; builds support for ideas & overcomes resistance.

Questions	Notes
1. Give me an example of a time where you deliberately chose to communicate an important message verbally, rather than in writing.	

Template 1.9

Competency-Based Interview Sheet

Questions	Notes
2. Tell me about a time someone misunderstood something that you said or wrote. How did you know that it had been misunderstood? How did you make yourself clear? 3. Tell me about a time you shared important information that had a direct bearing on the outcome of a situation or project. 4. Tell me about a time you failed to/forgot to give a team or a member of your team the information they needed to do the job. 5. Tell me about a very memorable team briefing that you delivered. 6. Describe a best experience you have had at a team meeting. 7. Tell me about a time when you effectively resolved a conflict in your team or between different team members or departments. 8. Tell me about the best idea you ever sold to an employee or higher level of management. What was your approach? 9. Give me an example of a time when you were unable to sell your idea/s to a key person. 10. Describe a situation in which you successfully convinced someone to see/do things your way.	

Empty Policy Format

Training Department - Policies Manual

Policy Number: TRG 01 Effective Date: 1 January 2009 Issue date: 1 January 2009 Review date: 1 June 2009	Insert NGO Logo Insert Policy Title
Policy Objective (Text) Policy Guidelines (Text)	

Template 1.11

Training Policy – Sample 1

Training Department - Policies Manual

Policy Number: TRG 01 Effective Date: 1 January 2009 Issue date: 1 January 2009 Review date: 1 June 2009	Insert NGO Logo Training Arrangements

Policy Objective

To organize the administration of any training event conducted by the NGO

Policy Guidelines

A. Training Announcements:

Training events will be announced three weeks prior to training events. Staff must complete their training request and sign it by their supervisor to be able to attend a training event.

Training Policy – Sample 1

B. Training Event Checklist

Area	Item	Checked	Signature
Venue	Seating arrangement		
	Internet connectivity		
Tools & Equipment	Data show		
	Flipchart		
	Markers		
	Laptop		
	Blank papers		
	Pens/ Markers		
	Microphone		
	Printer		
	Name tags		
Food and Beverages	Coffee Break		
	Lunch		
	Beverage		
Extra costs	Staff transportation		

C. Training Invitations

Training invitation must include the training subject, time and location. Below is one suggested template.

To:..

TRAINING SUBJECT: XXXXXXXX
WHEN: Day/Month/Year Time:
WHERE: [venue name] [venue address]
CONTACT: [Contact name] [Contact e-mail]
Office: (xxx) xxx-xxxx Fax: (xxx) xxx-xxxx

Template 1.12

Training Policy – Sample 2

Training Department - Policies Manual

Policy Number: TRG 01 Effective Date: 1 January 2009 Issue date: 1 January 2009 Review date: 1 June 2009	Insert NGO Logo Monthly Training Calendar

Policy Objective

To ensure that all planned Training activities are shared with all related parties.

Policy Guidelines

Based on the Training Plan of the NGO, the Training department issues a monthly calendar of activities.

The Training Calendar (sample enclosed with policy) is communicated by the 25th of each month to all NGO departments and NGO Director.

Training Policy – Sample 3

Training Department - Policies Manual

Policy Number: TRG 01 Effective Date: 1 January 2009 Issue date: 1 January 2009 Review date: 1 June 2009	Insert NGO Logo Training Attendance

Policy Objective

To provide guidelines on the scheduling of Training activities

Policy Guidelines

Employees should not be scheduled to attend skills training and Off-Job Training on their given days off. In this case, if employees are sometimes asked to attend on their day off, they must be compensated in lieu.

The manager in each department should advise the Training department about employees who are not able to attend any scheduled Training programme minimum 2 days in advance.

The Training Manager is responsible to ensure that attendance to Off-Job Training is recorded.

All employees attending Off-Job training sign to confirm their attendance using the Off-Job Training Attendance Sheet (sample enclosed with policy).

Information from the attendance sheets should then be transferred to the Training database to maintain an accurate record of all development received by employees.

Template 1.14

Training Policy – Sample 4

Training Department - Policies Manual

Policy Number: TRG 01 Effective Date: 1 January 2009 Issue date: 1 January 2009 Review date: 1 June 2009	Insert NGO Logo Requesting Training

Policy Objective

To provide guidelines on how to request attendance to Training activities

Policy Guidelines

Requests for training funds are limited to one request per person per year submitted two weeks prior to training event.

The training event must be relevant to the employee job, the career development, and the NGO mission. Training funds can be used for:

A. Classroom training
B. Attending workshops or conferences
C. On-line training

To qualify, the employee needs to be employed at the NGO as a full or part timer for at least six months and the latest performance evaluation must be “good”.

Employees requesting attendance of training activities should fill the Training Request Form.

Head of Department sign for approval and for further reimbursement if applicable. Employees will workflow the request to the Training department two weeks before training dates.

Confirm cancellation within two weeks prior to training dates.

Training Policy – Sample 4

TRAINING REQUEST FORM
Name:
Job title:
Date of request:
Name of the training
Date of the training:
How does this training help you do your job and/ or support your NGO?
Transportation costs (certain conditions apply)
Location:
This section to be completed by supervisor: I approve this request: Name of supervisor: Signature

Template 1.15

Standards of Performance (SOP) Sample

Task: How to file training documents

Task No. 006

Steps	Standards
1. Select the document	• Check that it was on top of the tray in order to make sure that everybody else in the office read it previously • Check that it is clean and readable
2. Punch Hole in the document	• See that it is punched for A4 size
3. Check File Index	• See that index is complete with all files existing • Amount of Files varies – the following is a minimum guideline: - Certificates - Cross Training - E-mail/ Mail & Memos - Grooming - Volunteers - Training Attendance - Training No-shows • See that numbers are assigned with every folder • Select the number from the index according to where the document needs to be filed
4. Select the file from the cupboard	• Open the file to see whether the number is corresponding to the selected content of file

Template 1.15

Standards of Performance (SOP) Sample

5. Select the divider	• See that you select the divider with the corresponding *name of department* for the following files: - Training Reports - E-mails/ Mails - Training Records - Volunteers & Trainees - Memorandum - Etc… • See that for Memorandum documents you select whether it is incoming or outgoing from the Training department • If no department is applicable for the Memo inside the file, select Miscellaneous in the outgoing or incoming dividers
6. Insert the document	• Place it inside the file and see that the Memo is facing you and can be read • See that the document is placed in the divider as identified before • Place documents into files with or without dividers in a way that the newest document is facing up
7. Close file and place it in cupboard	• See that you close the file and place it back in the cupboard according to the number
Approved By: ____________________ Department Head	 ____________________ Last Updated

Training Budget - Yearly

NGO	
Year	
Department	
Prepared by	
Approved on	

	Item	Location	# of Participants	Cost per unit/ Participant	Total (USD)
1	Human Rights Training	In-house training	30	$ 55.93	$1,678
2	Train the Trainer	@ training centre	15	$ 100.00	$1,500
3	NGO law seminar	NGO union	1	$ 22.00	$22
4	Diversity and dis-ability	In-house training	5	$ 200.00	$1,000
5	Advocacy	@ Plaza Hotel	40	$ 495.00	$19,800
6			30	$ -	$0
7			2	$ -	$0
8					$0
9					$0
				Grand Total	$24,000

Training Budget – Event

NGO	
Year	
Event	
Prepared by	
Approved on	

	Item	Description	Required #	Cost	Total (USD)
1	Instructor Fees	Including accommodation	1	$ 500.00	$ 500
2	Equipment Rental	Data show, laptop, printer	1	$ 78.00	$ 78
3	Stationery	Name tags, pens, flipchart	1	$ 20.00	$ 20
4	Transportation for participants		30	$ 5.00	$ 150
5	Interconnection card	2 cards for two day work-shop	2	$ 15.00	$ 30
6	Catering	(Lunch & coffee Break)	30	$ 30.00	$900
7			2	$ -	$0
8					$0
9					$0
				Total	USD 1,678

Template 1.18

Personal Development Plan

Name: ____________ Plan Period: ____________

Area of Strength / Area to Improve Learning	Learning Objective	Action Steps / Dates	Support Required	Review Method / Date

Template 1.19

Personal Development Plan Sample

Name: ______________________ Plan Period: ______________________

Area of Strength / Area to Improve Learning	Learning Objective	Action Steps / Dates	Support Required	Review Method / Date
Area to Improve Coaching Skills	To be able to develop the potential in others by coaching by December 2010	1. Attend the Coaching Program – 5 September 2. Conduct coaching session – 17 September 3. Observe and follow up on performance – 30 September 4. Follow same process with another employee – October 5. Ask for feedback from employees and manager – October	Self	Manager observation of employee performance & feedback - October Review meeting with TM – October
Area to Improve Influencing Skills	To be able to identify and use at least 3 influencing strategies to positively impact the results of 3 situations by December 2010	1. Read book 'Power of Influence' – End October 2. Review website www.gb.nlp.com – End October 3. Summarize research, listing possible techniques to use– Mid November 4. Identify one situation to influence upwards and test out technique. 5. Identify one situation to influence a group of employees. Test technique, record results and discuss with manager – November 6. Identify one situation to influence a peer and test out technique. Record results and discuss with manager – December 7. Based on results – further practice in identified situations – On-going		Record of Positive Results – After Situations Feedback from others – November Feedback from Manager – November & December

Annex Two

Chapter Two Templates

Template 2.1

SWOT Analysis

A process to generate information that is helpful in matching the NGO's goals, development programs, and capacities to the social environment in which it operates.

Strengths	Weaknesses
• What advantages does the NGO have? • What do you do better than anyone else? • What unique or lowest-cost resources do you have access to? • What do people see as your strengths? • What attracts donors and sponsors to you?	• What could you improve? • What should you avoid? • What are people likely to see as weaknesses?

Threats	Opportunities
• What obstacles do you face? • What are other NGOs doing that you should be worried about? • Are the required specifications for your job and services changing? • Is changing technology threatening your position? • Do you have a sponsoring problem? • Could any of your weaknesses seriously threaten your NGO activities?	• Where are the good opportunities facing you? • What are the interesting trends you are aware of?

Template 2.1

SWOT Analysis

SWOT Analysis

Strengths	Weaknesses

Threats	Opportunities

Template 2.2

STEP Analysis – External Factors (Factors Changing Outside the NGO)

STEP: External factors are those outside the influence of NGO. It is easiest to consider these under four main headings – also called a 'STEP Analysis':

Social	Technological
All factors connected to social trends, people's preferences and choices.	All factors connected to advances in the way we work and spend our leisure time.

Political	Economic
All factors connected to the political situation, government and legislation, both nationally and internationally.	All factors connected to the financial situation at home & abroad, and trading across industries & countries.

Examples of External Factors

Social

- Shift in demographics - age & populations
- Health scares – diseases, viruses, foods, medicines
- Personal security & safety concerns
- Environmental / Recycling influence
- Local beliefs, culture
- Tribal influences

Technological

- Computer size and capacity
- Use / speed of internet – things that can be done on-line e.g. access to information / website viewing / e-mailing
- Cable and satellite TV
- Communication technology – video conferencing / conference calls
- Equipment technology / user friendly

Template 2.2

STEP Analysis – External Factors (Factors Changing Outside the NGO)

Economic

- Recession / growth market
- Costs of real estate
- Variances in stock market
- Currency strengths / devaluations / exchange rates
- Oil prices
- Inflation

Political

- Change in politics
- Impact of terrorism on legislation – digital passports, increased screening, ID cards etc.
- World trade agreements
- Local laws

Template 2.2

STEP Analysis – External Factors (Factors Changing Outside the NGO)

STEP Analysis

Social	Technological

Political	Economic

Learning Styles Inventory 1

Honey & Mumford

It will probably take you about 15 -20 minutes to complete. The accuracy of the results depends on how honest you can be. There are no right or wrong answers.

If you agree place a √ in the 'Agree' box, if you disagree place a × in the 'Disagree' box. Be sure to answer every question.

	Agree	Disagree
1. I have strong beliefs about what is right and wrong, good and bad.	☐	☐
2. I often act without considering the possible consequences.	☐	☐
3. I tend to solve problems using a step-by-step approach.	☐	☐
4. I believe that formal procedures and polices restrict people.	☐	☐
5. I have a reputation for saying what I think, simply and directly.	☐	☐
6. I often find that actions based on feelings are as sound as those based on careful thought and analysis.	☐	☐
7. I like the sort of work where I have time for thorough preparation and implementation.	☐	☐
8. I regularly question people about their basic assumptions.	☐	☐
9. What matters most is whether something works in practice.	☐	☐
10. I actively seek out new experiences.	☐	☐
11. When I hear about a new approach I immediately start working out how to apply it in practice.	☐	☐
12. I am keen on self-discipline, such as watching my diet, taking regular exercise, sticking to a fixed routine, etc.	☐	☐
13. I take pride in doing a thorough job.	☐	☐

Learning Styles Inventory 1

	Agree	Disagree
14. I get on best with logical, analytical people and less well with spontaneous, irrational people.	☐	☐
15. I take care over the interpretation of data available to me and avoid jumping to conclusions.	☐	☐
16. I like to reach a decision carefully weighing up many alternatives.	☐	☐
17. I'm attracted more to novel, unusual ideas than to practical ones.	☐	☐
18. I don't like disorganised things and prefer to fit things into a coherent pattern.	☐	☐
19. I accept and stick to laid down procedures and polices so long as I regard them as an efficient way of getting the job done.	☐	☐
20. I like to relate my actions to a general principle.	☐	☐
21. In discussions I like to get straight to the point.	☐	☐
22. I tend to have distant rather formal relationships with people at work.	☐	☐
23. I thrive on the challenge of tackling something new and different.	☐	☐
24. I enjoy fun loving spontaneous people	☐	☐
25. I pay meticulous attention to detail before coming to a conclusion.	☐	☐
26. I find it difficult to produce ideas on impulse.	☐	☐
27. I believe in coming to the point immediately.	☐	☐
28. I am careful not to jump to conclusions too quickly.	☐	☐
29. I prefer to have as many sources of information as possible - the more data to think over the better.	☐	☐

Learning Styles Inventory 1

	Agree	Disagree
30. Flippant people who don't take things seriously enough usually irritate me.	☐	☐
31. I listen to other people's points of view before putting my own forward.	☐	☐
32. I tend to be open about how I am feeling.	☐	☐
33. In discussions I enjoy watching the manoeuvrings of the other participants.	☐	☐
34. I prefer to respond to events on a spontaneous, flexible basis rather than plan things out in advance.	☐	☐
35. I tend to be attracted to techniques such as network analysis, flow charts, branching programmes, contingency planning, etc.	☐	☐
36. It worries me if I have to rush out a piece of work to meet a tight deadline.	☐	☐
37. I tend to judge people's ideas on their practical merits.	☐	☐
38. Quiet, thoughtful people make me feel uneasy.	☐	☐
39. I often get irritated by people who want to rush things.	☐	☐
40. It is more important to enjoy the present moment than to think of the past or future.	☐	☐
41. I think that decisions based on a thorough analysis of all the information are sounder than those based on intuition.	☐	☐
42. I tend to be a perfectionist.	☐	☐
43. In discussions I usually produce lots of spontaneous ideas.	☐	☐
44. In meetings I put forward practical realistic ideas.	☐	☐
45. More often than not rules are there to be broken.	☐	☐

Learning Styles Inventory 1

	Agree	Disagree
46. I prefer to stand back from a situation and consider all the perspectives.	☐	☐
47. I can often see inconsistencies and weaknesses in other people's arguments.	☐	☐
48. On balance I talk more than I listen.	☐	☐
49. I can often see better, more practical ways to get things done.	☐	☐
50. I think written reports should be short and to the point.	☐	☐
51. I believe that rational, logical thinking should win the day.	☐	☐
52. I tend to discuss specific things with people rather than engaging in social discussions.	☐	☐
53. I like people who approach things realistically rather than theoretically.	☐	☐
54. In discussions I get impatient with irrelevancies and digressions.	☐	☐
55. If I have a report to write I tend to produce lots of drafts before settling on the final version.	☐	☐
56. I am keen to try things out to see if they work in practice.	☐	☐
57. I am keen to reach answers via a logical approach.	☐	☐
58. I enjoy being the one who talks a lot.	☐	☐
59. In discussions I often find I am the realist, keeping people to the point and avoiding wild speculation.	☐	☐
60. I like to ponder many alternatives before making up my mind.	☐	☐
61. In discussions I often find I am the most dispassionate and objective.	☐	☐

Learning Styles Inventory 1

	Agree	Disagree
62. In discussions I am more likely to adopt a low profile than to take the lead and do most talking.	☐	☐
63. I like to relate current actions to a longer term, bigger picture.	☐	☐
64. When things go wrong I am happy to shrug it off and put it down to experience.	☐	☐
65. I tend to reject wild spontaneous ideas as being impractical.	☐	☐
66. It's best to think carefully before taking action.	☐	☐
67. On balance I do the listening rather than talking.	☐	☐
68. I tend to be tough on people who find it difficult to adopt a logical approach.	☐	☐
69. I believe the end justifies the means most of the time.	☐	☐
70. I don't mind hurting people's feelings as long as the job gets done.	☐	☐
71. I find the formality of having specific objectives and plans stifling.	☐	☐
72. I'm usually one of those people who put life into the party.	☐	☐
73. I do whatever is expedient to get the job done.	☐	☐
74. I quickly get bored with methodical, detailed work.	☐	☐
75. I am keen on exploring the basic assumptions, principles and theories underpinning things and events.	☐	☐
76. I'm always interested in finding out what people think.	☐	☐
77. I like meetings to be run on methodical lines, sticking to a laid down agenda, etc.	☐	☐
78. I steer clear of subjective or ambiguous topics.	☐	☐

Learning Styles Inventory 1

	Agree	Disagree
79. I enjoy the drama and excitement of a crisis situation.	☐	☐
80. People often find me insensitive to their own feelings.	☐	☐

You score one point for each item you ticked (√). There are no points for items you crossed (×)

Simply indicate on the lists below which items were ticked.

	2	7	1	5
	4	13	3	9
	6	15	8	11
	10	16	12	19
	17	25	14	21
	23	28	18	27
	24	29	20	35
	32	31	22	37
	34	33	26	44
	38	36	30	49
	40	39	42	50
	43	41	47	53
	45	46	51	54
	48	52	57	56
	58	55	61	59
	64	60	63	65
	71	62	68	69
	72	66	75	70
	74	67	77	73
	79	76	78	80
Total	____________	____________	____________	____________
	Activist	Reflector	Theorist	Pragmatist

Learning Styles Inventory 1

Ring your scores on this chart and join up. From this you can identify your strongest preference.

Activist	Reflector	Theorist	Pragmatist	
20 19 18 17 16 15 14 13	20 19 18	20 19 18 17 16	20 19 18 17	Very strong preference
12 11	17 16 15	15 14	16 15	Strong preference
10 9 8 7	14 13 12	13 12 11	14 13 12	Moderate preference
6 5 4	11 10 9	10 9 8	11 10 9	Low preference
3 2 1 0	8 7 6 5 4 3 2 1 0	7 6 5 4 3 2 1 0	8 7 6 5 4 3 2 1 0	Very low preference

Learning Styles Inventory 1

The Activist – Experiencing
‘Let me have a go!’

Activists involve themselves fully and without bias in new experiences. They enjoy the here and now and are happy to be dominated by immediate experiences. They are open-minded, not sceptical and this tends to make them enthusiastic about anything new.

Their philosophy is “I’ll try anything once”. They tend to act first and consider the consequences afterwards. Their days are filled with activity. They tackle problems by brainstorming. As soon as the excitement from one activity has died down they are busy looking for the next. They tend to thrive on the challenge of new experiences but are bored with implementation and longer-term consolidation. They are gregarious people constantly involving themselves with others but, in doing so; they seek to centre all activities on themselves.

The Reflector – Thinking
‘Just let me think about it!’

Reflectors like to stand back to ponder experiences and observe them from many different perspectives. They collect data, both first hand and from others, and prefer to think about it thoroughly before coming to any conclusion. The thorough collection and analysis of data about experiences and events is what counts so they tend to postpone reaching definitive conclusions for as long as possible.

Their philosophy is to be cautious. They are thoughtful people who like to consider all possible angles and implications before making a move. They prefer to take a back seat in meetings and discussions. They enjoy observing other people in action. They listen to others and get the drift of the discussion before making their own points. They tend to adopt a low profile and have a slightly distant, tolerant, unruffled air about them. When they act it is part of a wide picture which includes the past as well as the present and others’ observations as well as their own. However, they may stay with known methods and not experiment.

The Theorist – Concluding
‘What does it mean?’

Theorists adapt and integrate observations into complex but logically sound theories. They think problems through in a vertical, step-by-step logical way. They assimilate disparate facts into coherent theories. They tend to be perfectionists who don’t rest easy until things are tidy and fit into a rational scheme. They like to analyse and synthesise. They are keen on basic assumptions, principles, theories, models and systems thinking.

Learning Styles Inventory 1

Their philosophy prizes rationality and logic. “If it’s logical, it’s good”. Questions they frequently ask are: “Does it make sense?” “How does this fit with that?” “What are the basic assumptions?” They tend to be detached, analytical and dedicated to rational objectivity rather than anything subjective or ambiguous. Their approach to problems is consistently logical. This is their ‘mental set’ and they rigidly reject anything that doesn’t fit with it. They prefer to maximise certainty and feel uncomfortable with subjective judgements, lateral thinking and anything flippant. However, they may not put their theories into practice.

The Pragmatist – Planning
‘Does it work in real life?’

Pragmatists are keen on trying out ideas, theories and techniques to see if they work in practice. They positively search out new ideas and take the first opportunity to experiment with applications. They are the sort of people who return from management courses brimming with new ideas that they want to try out in practice. They like to get on with things and act quickly and confidently on ideas that attract them. They tend to be impatient with ruminating and open-ended discussions.

They are essentially practical, down to earth people who like making practical decisions and solving problems. They respond to problems and opportunities as a ‘challenge’. Their philosophy is “There is always a better way” and “if it works it’s good”. However, they may flounder if they lack theoretical foundations to help them.

Template 2.4

Learning Styles Inventory 2

VAK Questionnaire

Circle or tick the answer that most represents how you generally behave.

1. When I operate new equipment I generally:
a) read the instructions first
b) listen to an explanation from someone who has used it before
c) go ahead and have a go, I can figure it out as I use it

2. When I need directions for travelling I usually:
a) look at a map
b) ask for spoken directions
c) follow my nose and maybe use a compass

3. When I cook a new dish, I like to:
a) follow a written recipe
b) call a friend for an explanation
c) follow my instincts, testing as I cook

4. If I am teaching someone something new, I tend to:
a) write instructions down for them
b) give them a verbal explanation
c) demonstrate first and then let them have a go

5. I tend to say:
a) watch how I do it
b) listen to me explain
c) you have a go

6. During my free time I most enjoy:
a) going to museums and galleries
b) listening to music and talking to my friends
c) playing sport or doing DIY

7. When I go shopping for clothes, I tend to:
a) imagine what they would look like on
b) discuss them with the shop staff
c) try them on and test them out

8. When I am choosing a holiday I usually:
a) read lots of brochures
b) listen to recommendations from friends
c) imagine what it would be like to be there

Learning Styles Inventory 2

9. If I was buying a new car, I would:
a) read reviews in newspapers and magazines
b) discuss what I need with my friends
c) test-drive lots of different types

10. When I am learning a new skill, I am most comfortable:
a) watching what the teacher is doing
b) talking through with the teacher exactly what I'm supposed to do
c) giving it a try myself and work it out as I go

11. If I am choosing food off a menu, I tend to:
a) imagine what the food will look like
b) talk through the options in my head or with my partner
c) imagine what the food will taste like

12. When I listen to a band, I can't help:
a) watching the band members and other people in the audience
b) listening to the lyrics and the beats
c) moving in time with the music

13. When I concentrate, I most often:
a) focus on the words or the pictures in front of me
b) discuss the problem and the possible solutions in my head
c) move around a lot, fiddle with pens and pencils and touch things

14. I choose household furnishings because I like:
a) their colours and how they look
b) the descriptions the sales-people give me
c) their textures and what it feels like to touch them

15. My first memory is of:
a) looking at something
b) being spoken to
c) doing something

16. When I am anxious, I:
a) visualise the worst-case scenarios
b) talk over in my head what worries me most
c) can't sit still, fiddle and move around constantly

17. I feel especially connected to other people because of:
a) how they look
b) what they say to me
c) how they make me feel

Template 2.4

Learning Styles Inventory 2

18. When I have to revise for an exam, I generally:
a) write lots of revision notes and diagrams
b) talk over my notes, alone or with other people
c) imagine making the movement or creating the formula

19. If I am explaining to someone I tend to:
a) show them what I mean
b) explain to them in different ways until they understand
c) encourage them to try and talk them through my idea as they do it

20. I really love:
a) watching films, photography, looking at art or people watching
b) listening to music, the radio or talking to friends
c) taking part in sporting activities, eating fine foods and wines or dancing

21. Most of my free time is spent:
a) watching television
b) talking to friends
c) doing physical activity or making things

22. When I first contact a new person, I usually:
a) arrange a face to face meeting
b) talk to them on the telephone
c) try to get together whilst doing something else, such as an activity or a meal

23. I first notice how people:
a) look and dress
b) sound and speak
c) stand and move

24. If I am angry, I tend to:
a) keep replaying in my mind what it is that has upset me
b) raise my voice and tell people how I feel
c) stamp about, slam doors and physically demonstrate my anger

25. I find it easiest to remember:
a) faces
b) names
c) things I have done

Learning Styles Inventory 2

26. I think that you can tell if someone is lying if:
a) they avoid looking at you
b) their voices changes
c) they give me funny vibes

27. When I meet an old friend:
a) I say "it's great to see you!"
b) I say "it's great to hear from you!"
c) I give them a hug or a handshake

28. I remember things best by:
a) writing notes or keeping printed details
b) saying them aloud or repeating words and key points in my head
c) doing and practising the activity or imagining it being done

29. If I have to complain about faulty goods, I am most comfortable:
a) writing a letter
b) complaining over the phone
c) taking the item back to the store or posting it to head office

30. I tend to say:
a) I see what you mean
b) I hear what you are saying
c) I know how you feel

Now add up how many A's, B's and C's you selected.

A's = B's = C's =

The Theory

The particular learning styles methodology we are going to discuss today is called VAK – Visual, Auditory & Kinaesthetic.

It was first developed by Dr Rita Dunn in 1967 in relation to teaching children. However, it has become very popular in the training world because its principles and benefits extend to all types of learning and development for all age groups.

Template 2.4

Learning Styles Inventory 2

VAK is a very easy and quick way to assess people's preferred learning style, and more importantly for us, to design learning experiences that match people's preferences.

The background to the theory states that:

- Everyone has strengths, but different people have different strengths
- Different training environments, materials and approaches appeal to different strengths
- Given an appealing environment, students have higher achievement rates than in environments which don't appeal to them

The VAK model says that most people possess a dominant or preferred leaning style. However some people have a mixed or evenly balanced blend of the three styles, so let's see what we can discover about each of you.

If your highest score is:

A – your strongest preference is visual
B – your strongest preference is auditory
C – your strongest preference is kinaesthetic

- Someone with a Visual learning style has a preference for seen or observed things.

These people will use phrases such as 'show me', 'let's have a look at that' and will be best able to perform a new task after reading the instructions or watching someone else do it first. These are the people who will work from lists and written directions and instructions.

In a training situation, they will need to see the trainer's body language and facial expression to fully understand the content of the session. They will probably prefer to sit at the front of the room to avoid visual obstruction. They think in pictures.

- Someone with an Auditory learning style has a preference for the transfer of information through listening – to the spoken word of self or others, to sounds and noises.

These people will use phrases such as 'tell me', 'let's talk it over' and will be best able to perform a new task after listening to instructions from an expert. These are the people who are happy being given spoken instructions over the telephone, and can remember all the words to songs that they hear!

Learning Styles Inventory 2

They interpret the underlying meanings of speech – tone of voice, pitch, speed etc. Written information has little meaning until it's heard. They think in words.

- Someone with a Kinaesthetic learning style has a preference for physical experience - touching, feeling, holding, doing, practical hands-on experiences.

These people will use phrases such as 'let me try', 'how do you feel?' and will be best able to perform a new task by going ahead and trying it out, learning as they go. These are the people who like to experiment, hands-on, and never look at the instructions first! They will find it hard to sit still for long periods and need activity and actual experiences. They learn through movement.

With acknowledgements to Victoria Chislett for developing this assessment. Victoria Chislett specialises in performance psychology and its application within organisations.

Template 2.5

Performance Appraisals - Summary

Employee Info				(Insert competency)	(Insert competency)	(Insert competency)	(Insert competency)	(Insert competency)	(Insert competency)	(Insert competency)	(Insert competency)	(Insert competency)	(Insert competency)			
Department	Employee Name	Job Tittle	Joining Date	Rating	Rating	Rating	Rating	Rating	Rating	Rating	Rating	Rating	Rating	Overall Performance Rating	Reviewer	Personal Development Plan
Summary of Competencies																

Task Inventory Questionnaire

The table below contains a list of tasks relating to your job. Below each task is a section to record:

1. The **frequency** the task is performed - Record it as the approximate number of times that it is performed hourly, daily, weekly, etc. For example: 4 times a day

2. The **criticality** of each task for the successful performance of the job - There are 4 levels. Circle the one that you believe best describes the task:

1) Not important   2) Somewhat important   3) Important   4) Most important

3. The amount of **training required** to reach proficiency - Enter the number of hours that you believe it would take a new hire to become proficient in the job. It is best to use the total amount of training that you received for you to become proficient.

Job Title: Name:

Department:

Task Number	Task		
	(Insert Task)		
	Frequency	Criticality 1 2 3 4	Training Required
	(Insert Task)		
	Frequency	Criticality 1 2 3 4	Training Required
	(Insert Task)		
	Frequency	Criticality 1 2 3 4	Training Required
	(Insert Task)		
	Frequency	Criticality 1 2 3 4	Training Required
	(Insert Task)		
	Frequency	Criticality 1 2 3 4	Training Required

Template 2.7

Work Analysis Interview

(The questions included are only samples; they can be amended depending on the job chosen for the analysis)

Job		Date	
Interviewer		Interviewee	

Questions	Yes	No	Comments
Does the employee know what to do?			
Are there any written standards for the job?			
Is performance measured?			
Is the task performed to standard?			
Is training provided?			
Is training effective?			
Are job aids available?			
Are performance gaps identified?			
Are corrective actions taken to amend?			
Etc...			

Recommendations:

Template 2.8

Training Needs Analysis Report

NGO Name

Training Needs Analysis Report

Prepared by (insert name)
Job Title
Date

Template 2.8

Training Needs Analysis Report

Executive Summary

Points to include:

- An overview of what the report includes
- A brief summary of the report highlights
- Mention the period when the analysis was conducted
- In case the Training Needs Analysis was conducted by the NGO on another organization/ external project, amend the content accordingly
- Explain how the report will be circulated
- Mention what are the expected actions to be taken after circulation

Introduction

Points to include:

- Background information about the NGO
- Objectives of the Training Needs Analysis
- Mention who conducted the analysis

Terms of Reference

Points to include:

- Explanation about technical words, jargon used in the report

Methods Used

Points to include:

- Mention all the methods used to collect the TNA data (surveys, questionnaires, etc…)
- Provide a brief explanation about each method and how the work was organized

Training Needs Analysis Report

Targeted Audience

Points to include:
- Include the number of people involved, their levels and other relevant demographical information, related to the TNA

Outcomes & Findings

Points to include:
- Provide factual data
- Include numbers, percentages, charts, etc… in order to quantify the information
- Provide information on how the data was analyzed
- Insert comments and interpretations where needed
- Segregate Development and Non-development needs
- Mention that, if all recommendations are approved by the NGO Management, a Training Plan will be written, based on the TNA findings

Conclusions & Recommendations

Points to include:
- All recommended Training solutions to be implemented
- Mention details about the training solutions: if it is outsourced, if programme is available, etc…
- Specify the main areas of focus: jobs, competencies, employee levels, areas of work, department, etc…
- Include recommendations for both Development and Non-development needs

Bibliography

Points to include:
- Any books or websites used as reference to develop the Training Needs Analysis

Appendices

Points to include:
- Sample of all tools used to collect the information
- Additional documents (policies, procedures, etc…) used during the analysis, only if necessary

Template 2.9

Training Needs Analysis - Work Plan

Daily Schedule				
Date	**Activity**	**By Whom**	**By When**	**Resources**
Sunday 20 Sept. 8 am - 1:30 pm	1. Conduct interviews in six departments by four two-member teams			Review Annex. C in the TNA Manual.
	2. After each interview, members return to the assessment office for debriefing	Team Leader		
	3. Schedule employees from Finance and Personnel departments to convene at scheduled times to complete survey questionnaires	Team Leader	Tuesday 22 Sept., (10:00 am - 1:30 pm)	
	4. Schedule employees (three) from departments to be surveyed to participate in the skills test		8:00 am	
Monday 21 Sept. 8 am - 11 am	1. Team members report to the interview official to be interviewed at the scheduled times.			Interview notes prepared
	2. After each interview, team members return to assessment office for debriefing.			

Template 2.10

Training Plan Format

Plan Period:
(Example included)

Development Area	Development Objective	Development Method/ Description	Delegate Nos. Level	Responsibility	Completion Date/ Duration	Review Method
HIV Awareness	By the end of the program, participants will be able to list the transmission way of HIV and the methods of precaution	Off-job presentation	All organization x members	Training Manager	End of June 2010	Verbal test 2 weeks after completion of the program

Annex Three

Chapter Three Templates

Template 3.1

Concept Development Format

Project Name: ____

Presented By: ____

Background Info About the Project	
Business Reason for Design	
History of the Problem to Be Resolved	
Purpose of the Program	
Learning Objectives	
Target Audience	
Requirements	
Various Constraints	
Language	
Suggested Modules	
Sponsorship	

Template 3.2

Project Plan - Sample

Key Project Milestones & Timeline	By Whom	By When	√
Manual Production - Initial meeting to discuss the project details and scope - Brainstorm the program content, sessions topics, name of program - Organize a meeting to finalise the content of the program (name, topics, objectives etc) - Communicate the suggested content and name to NGO Management for approval - Design and write the sessions as per the confirmed manual content, structure, session topics (Write trainer notes as per standard NGO format, create exercises, games, role plays, PowerPoint slides) - Organize a meeting to finalise the program training manual - Complete final alterations to the manual Manual Communication - Communicate Program manual to related parties for approval - Etc... Programme Advertising - Send a note to all related parties, etc....			

Template 3.2

Project Plan - Sample

Key Project Milestones & Timeline	By Whom	By When	√
Pilot Program - To organise pilot program in the venue and with the following trainers - Get feedback on the program after pilot session - Modify, review feedback and make changes where applicable Program Roll-Out & Evaluation - Select pool of trainers from team - Produce and distribute manuals - Implement evaluation and monitoring system to review training effectiveness			

Type of Requirement	Detailed Description	Numbers	Source	Cost	Person In Charge
Stationery (Examples: paper, note books, pens, flip chart paper, copies of hand-out, markers, scotch tape, glue sticks, note cards…etc)	1. 2. 3. 4.				
Equipment (Examples: Overhead projector, Data show, flip chart, digital camera, ..etc)	1. 2. 3.				
Miscellaneous (Examples: Props for ice- breakers,)	1. 2.				

Template 3.3

Training Notes Template

Key Points	Detailed Information	Visual Support
Interest		
Need		
Title		
Range		
Objectives		

Key Points	Detailed Information	Visual Support
Development		

Template 3.3

Training Notes Template

Key Points	Detailed Information	Visual Support
Consolidation		

Template 3.4

Icebreakers & Energizers – Sample 1

Icebreaker	X
Energizer	
Team Building Exercise	

Please tick as appropriate

TITLE	Favorite Animal
PURPOSE	Getting people to open up
IDEAL GROUP SIZE	6-15
MATERIALS REQUIRED	Pens, Name Cards
TIME REQUIRED	10-15 min
RUNNING INSTRUCTIONS	As the learners arrive, and before you write their names on a name card, ask them to tell you their favorite animal and three adjectives to describe the animal. As they tell you, write the three adjectives on a name tag BEFORE their name (omit the name of the animal). Ask them to mingle with the crowd, sharing why these adjectives best describe their own personality. EXAMPLES: Loyal, cuddly, playful Dan.

Template 3.5

Icebreakers & Energizers – Sample 2

Icebreaker	X
Energizer	
Team Building Exercise	

Please tick as appropriate

TITLE	Circle of Friends
PURPOSE	Greeting and departure for a large group
IDEAL GROUP SIZE	Large groups
MATERIALS REQUIRED	No
TIME REQUIRED	Depends on group size
RUNNING INSTRUCTIONS	This is a great greeting and departure for a large group who will be attending a seminar for more than one day together and the chances of meeting everyone in the room is almost impossible. Form two large circles (or simply form two lines side by side), one inside the other and have the people in the inside circle face the people in the outside circle. Ask the circles to take one step in the opposite directions, allowing them to meet each new person as the circle continues to move very slowly. If lines are formed, they simply keep the line moving very slowly, as they introduce themselves.

Template 3.6

Icebreakers & Energizers – Sample 3

Icebreaker	X
Energizer	
Team Building Exercise	

Please tick as appropriate

TITLE	Funny story about us
PURPOSE	To move you out of the comfort zone, to say something personal, this way getting a little closer to one another.
IDEAL GROUP SIZE	5-12
MATERIALS REQUIRED	None
TIME REQUIRED	4-6 minutes / person
RUNNING INSTRUCTIONS	Sit around in a circle, and one after the other participants tell a funny story about themselves for 4 minutes roughly.

Icebreakers & Energizers – Sample 4

Icebreaker	
Energizer	X
Team Building Exercise	

Please tick as appropriate

TITLE	Chinese Whisper
PURPOSE	To get your brain moving a little, and to laugh. A good communication exercise.
IDEAL GROUP SIZE	5-12
MATERIALS REQUIRED	None
TIME REQUIRED	4-6 minutes / round
RUNNING INSTRUCTIONS	Trainees form a half circle. The instructor whispers a sentence into the ear of the trainee at one end of the circle, who then has to whisper the same sentence into the ear of the person next to him/her, and this person has to do the same to the person next to him/her, and so on. At the end, the last person will say the version of the sentence aloud. You can do a few rounds.

Icebreakers & Energizers – Sample 5

Icebreaker	
Energizer	X
Team Building Exercise	

Please tick as appropriate

TITLE	Have you ever had your "colors" done?
PURPOSE	
IDEAL GROUP SIZE	
MATERIALS REQUIRED	You have to prepare coloured paper or anything else with different colors (those mentioned below) and put them on the table in big number for participants to select two of them.
TIME REQUIRED	
RUNNING INSTRUCTIONS	Do you buy your clothes according to your "color" chart? Have you decorated a room to take advantage of the soothing effects of some colors - or the warming effects of others? Do you wear certain colors because they make you "feel" good? Have you been exposed to statements like "as good as gold," "true blue," or "look for the silver lining?" Color has been used to shape and describe our lives, our habits, our values, and our feelings throughout the ages. Research into the physiological effects of color has shown that it truly has an impact on our lives, often in unconscious and mysterious ways. Color can relieve tension and stress. Blue, for instance, is associated with tranquil surroundings. Thus, it is fitting that color provides the "association" between a temperament type and learning tools. How much better it is to refer to and connect with color than with the highly technical formulas, symbols, words, and numbers generally associated with temperament/personality/learning theory. Now, select your favourite color and I will tell you what it means. The participants have to tell if the descriptions suit their characters and features.

Icebreakers & Energizers – Sample 5

Colors	Magical Associations
Black	Divination, banishing, absorbing negative energy, protection, binding.
Blue	Truth, tranquility, protection, hope, honor, change, psychic ability.
Brown	Stability, integrity, justice, sensuality, endurance, animals, concentration, grounding.
Gold	The God, vitality, strength, success, action, courage, confidence.
Gray	Vision, neutrality, absorbs negativity.
Green	Abundance, growth, healing, prosperity, fertility, employment, luck, jealousy.
Indigo	Insight, vision, change, flexibility, psychic abilities.
Magenta	Intuition, change, spiritual healing, vitality.
Orange	Courage, pride, ambition, enthusiasm, energy, friendship, communication, success, opportunities.
Pink	Compassion, tenderness, harmony, affection, love, romance, spiritual healing.
Purple	Growth, self-esteem, psychic ability, insight, inspiration, spirituality, success in business.
Red	Sexual love, lust, passion, fire, willpower, courage, energy, strength, anger.
Silver	The Goddess, spiritual truth, intuition, receptivity, psychic ability, stability, balance.
Turquoise	Creativity, discipline, self-knowledge, honor, idealism.
Violet	Success, intuition, self-improvement, spiritual awareness.
White	Cleansing, peace, protection, healing, truth, divination, tranquility (white can be used in place of any color).
Yellow	Joy, vitality, intelligence, study, persuasion, charm, creativity, communication.

Icebreakers & Energizers – Sample 6

Icebreaker	X
Energizer	
Team Building Exercise	

Please tick as appropriate

TITLE	Autograph Sheet
PURPOSE	A good icebreaker and introduction exercise. Gives the participants the opportunity to talk to each other during the interviews to find the right people
IDEAL GROUP SIZE	8-20
MATERIALS REQUIRED	A4 sheets with various traits written on. One copy for each participant.
TIME REQUIRED	Depends on group size
RUNNING INSTRUCTIONS	Participants are given a sheet with various traits on it. The objective is to find a person in the group who fits one of the descriptions and get that person's autograph next to the trait. When making up the list, be creative, but include traits pertinent to the group. Each person may sign each sheet only once. Here are some examples: Likes broccoli ______________ Balances his/her cheque book _______________ Has been to a fortune teller _______________ Speaks another language ________________ The person who gets all the autographs first is the winner. Then you read all the traits one by one and make the group tell the name of the person who owns that trait. Note: Make sure to include descriptions that are interesting. It helps if you can contact the participants before the training and get this information directly from them. Otherwise, make sure to have some (2-3) general descriptions that might be applicable for more people.

Icebreakers & Energizers – Sample 7

Icebreaker	
Energizer	X
Team Building Exercise	

Please tick as appropriate

TITLE	Catch Me If You Can
PURPOSE	This exercise is mainly used to energize the group and to have fun. It is also used as a tool for the participants to evaluate their observation skills (awareness skills).
IDEAL GROUP SIZE	Even number of participants (6-20)
MATERIALS REQUIRED	None
TIME REQUIRED	80 seconds
RUNNING INSTRUCTIONS	Players should be paired up. All players divide into two lines (facing in) shoulder to shoulder, with partners facing each other. Participants should be given approximately 30 seconds to look at their partners, taking in all details about the individual. The leader then instructs the two lines to turn and face away from the center. One or both lines has 15-20 seconds to change something about their appearance (i.e. change a watch to different wrist, unbutton a button, remove a belt, etc.). The change must be discrete, but visible to the partner. The players again turn in to face each other and have 30 seconds to discover the physical changes that have been made. Players get to interact with each other and have fun!

Icebreakers & Energizers – Sample 8

Icebreaker	X
Energizer	
Team Building Exercise	

Please tick as appropriate

TITLE	Overdraft
PURPOSE	To show people that even the very best of us fail at some activities.
IDEAL GROUP SIZE	Unlimited
MATERIALS REQUIRED	Rope (12m length)
TIME REQUIRED	2 - 5 minutes
RUNNING INSTRUCTIONS	1. Lay the rope in a straight line along the ground. 2. Ask everyone in the group to stand 30 cm away from the rope. 3. Ask them to bend over and grap on firmly to the ends of their feet with both hands. 4. Their task is to jump over the rope without letting go of their feet. Tell participants that, if anyone can do this, they will win a brand new $10 note. They must jump forwards, not roll or fall, and they must keep hold of their feet. 5. After everyone has given up, tell them that there may be times when they can't "win" during activities in the programme. Point out that winning or losing isn't the most important thing - it's more a matter of learning through the process. Some tasks may seem impossible and they may not be. Tell parcipants to focus on the process and have fun at the same time! Sample debriefing questions: Is it possible to perform this task? What is the purpose of this exercise? How does this activity relate to what we are about to get involved?

Template 3.12

Icebreakers & Energizers – Sample 9

Icebreaker	
Energizer	X
Team Building Exercise	

Please tick as appropriate

TITLE	Confusion
PURPOSE	Great high energy game to help participants begin to feel more comfortable in a new group
IDEAL GROUP SIZE	8-20
MATERIALS REQUIRED	Sheets with various tasks for each participant.
TIME REQUIRED	Depends on the number and complexity of the tasks.
RUNNING INSTRUCTIONS	Give each participant a sheet with various tasks and ask them to complete it when you say, "GO!" Here is a sample: Get a male to do five push-ups and sign here Stand on one foot with your arms outstretched for 20 seconds. Have someone time you and sign here Leap frog over someone 5 times Get someone to whisper the ….. song and sign here Play ….. (a small game like paper-scissors-rock) with two other people (or so depending on the game) and have them sign here Shake hands with someone you do not know and continue holding hands while debating the merits of your favorite ice cream flavor Have someone teach you a dance step (even if they make it up) First person to complete the entire sheet, wins.

Annex Four

Chapter Five Examples & Templates

Example 5.1

Reaction Form – Customized

[Name of Training Program]
[Date]
Reaction Form - Summary

Instructions: Place an X in the column 1, 2, 3 or 4 to indicate our evaluation of each item.

		Negative			Positive	
Introduction and Training Objectives		1	2	3	4	Rating
1.	Appropriate	0	2	7	14	3.52
2.	Organized to facilitate learning	0	2	7	14	3.52
3.	Clearly stated	1	4	0	11	3.23
4.	Agenda encouraged participant involvement	0	3	0	11	3.35
5.	Sessions/exercises helped accomplish overall objectives	0	5	0	12	3.30
					Overall Rating	3.38

Comments:

		Negative			Positive	
Session 1: Concepts, Expressions and Means used in Human Rights Advocacy		1	2	3	4	Rating
6.	Organized	0	2	8	13	3.48
7.	The organization helped facilitate discussion between trainees	0	1	9	13	3.61
8.	Session time was adequate	4	5	6	10	2.70
9.	Content of the session was appropriate	0	3	4	16	3.39
					Overall Rating	3.29

Comments:

Example 5.1

Reaction Form – Customized

Session 2: Human Rights according to the United Nations		Negative 1	2	3	Positive 4	Rating
10.	Organized	0	2	8	13	3.48
11.	The organization helped facilitate discussion between trainees	0	1	9	13	3.52
12.	Session time was adequate	2	5	6	10	3.04
13.	Content of the session was appropriate	0	3	4	16	3.57
					Overall Rating	3.40

Comments:

Session 3: International Treaties and Their Implementation		Negative 1	2	3	Positive 4	Rating
14.	Organized	0	2	8	13	3.48
15.	The organization helped facilitate discussion between trainees	0	2	6	15	3.57
16.	Session time was adequate	3	2	10	7	2.95
17.	Content of the session was appropriate	0	3	9	10	3.32
					Overall Rating	3.33

Comments:

Training Content		Negative 1	2	3	Positive 4	Rating
18.	Accurate	0	5	11	7	3.08
19.	Current	0	2	8	13	3.48
20.	Adequate in scope	0	9	6	8	2.61
21.	Sequenced properly	0	0	5	18	3.78
					Overall Rating	3.25

Comments:

Example 5.1

Reaction Form – Customized

Training Setting		Negative 1	2	3	Positive 4	Rating
22.	Comfortable	2	6	6	9	2.96
23.	Quality materials and visual aids	0	8	10	5	2.87
24.	Adequate equipment	0	4	9	10	3.26
25.	Administrative support	0	3	5	15	3.52
					Overall Rating	3.15

Comments:

Trainer: Jack Smith's Delivery		Negative 1	2	3	Positive 4	Rating
26.	Effective presentation style	0	0	5	17	3.77
27.	Preparation/knowledge of material	0	1	4	17	3.73
28.	Actively solicited participation	0	0	5	17	3.77
29.	Respectful of participant contributions	0	0	5	17	3.76
					Overall Rating	3.76

Comments:

30. What are the points of strength of the training program?

32. What are the points of improvement for the training program?

33. What aspect of the training program was most beneficial for you?

34. Specific program question 1

35. Specific program question 2

Example 5.2

Reaction Form - Standard

[Name of Workshop]
[Date]
Reaction Form Summary

Please circle your response to each statement.	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)	Not Applicable (0)	Avg
1. The workshop's objectives were clearly stated.				4	8	1	4.3
2. The workshop's objectives were achieved.			1	5	7		4.5
3. The workshop's outline and schedule was clear to me.				6	7		4.5
4. The workshop covered what I expected it to cover.			2	5	6		4.3
5. The workshop satisfied my professional needs in this area.			1	5	7		4.1
6. The workshop's content was interesting.				4	8		4.3
7. The trainer/s was/were effective.			1		12		4.9
8. The level of interactivity was appropriate for this workshop.				7	5	1	4.1
9. The supporting resource materials supplied (or referred to) are relevant and useful to me.			1	6	6		4.4
10. As a result of the workshop, I believe I obtained the needed skills to produce future social issue documentaries.			1	6	6		4.4
11. The facilities provided a suitable environment for training.		1	1	4	7		4.3

Example 5.2

Reaction Form - Standard

Please circle 'Yes' or 'No' to the following statements	Yes	No	If 'No' please comment
12. The duration of the workshop was right for me.	11	2	Needed more training time on camera aspects. Wasn't' suitable to benefit from the experience of the trainer nor for research or for work time to develop a strong documentary
13. The pace of the workshop was right for me.	12	1	It was not appropriate for the needs of each individual. It was fast. The level of knowledge of each individual was not accounted for.
14. The level of difficulty of the content was right for me.	13		

Please circle your response to each statement.	Weak (1)	Acceptable (2)	Good (3)	Very Good (4)	Excellent (5)	No Answer	Avg
Instructor: John Smith							
15. Effective presentation style			1		12		4.8
16. Preparation and knowledge of the training material				1	12		4.9
17. Guidance and leading of the training				1	11	1	4.5
Instructor: Janette Smith							
18. Effective presentation style	1			4	7	1	4
19. Preparation and knowledge of the training material			1	3	8	1	4.2
20. Guidance and leading of the training	1		1	1	8	2	3.7

Example 5.2

Reaction Form - Standard

21. Please write the training program's areas of strength from your point of view.

- Instructors (3)
- Environment (2)
- Agenda and timing (2)
- Location (2)
- Good and interesting
- Very beneficial
- Comprehensive and the time was distributed well
- The work amongst the team
- The contribution of other participants on the team in establishing what was lost from some technical skill
- Focus of the trainer on the goal of each stage so that we were able to produce in every stage more than was possible in spite of our attempts which were often scattered. He kept us on the correct path.
- Presentation of the training material
- Leaving the freedom to the participants in the research is something that will help us in the future for choosing subjects for our films, researching them, discovering strong and weak points in subject research and other things that are connected to preparation activities, filming and production of films.
- The material was very good with the time of the course.
- The hosts of the course were very cooperative.
- The practical application
- The equipment we used was excellent and gave us a true opportunity to make a good film.
- Clear goals for the program were achieved effectively by God's grace, by the trainers and those putting on the program.
- The two days preparation prior to the workshop.
- Knowledge level of the participants
- Follow-up on the situation of the participants.

22. Please write the training program's areas of weakness from your point of view.

- Shortage of time during the preparation stage which was only two days (3).
- It might have been better to reduce the amount of the material during those two days or make it three days.
- The training day began early.
- Not leaving enough time for research before the beginning.
- The control and length of the course hours and the number of days.
- Nature of the winter with sicknesses of the cold and flu.
- The length of the training daily.
- The inability to choose the four topics during the workshop.
- It was not clear to what extent the idea of the film was to be completed at the beginning of the workshop so we needed more time for research.

Reaction Form - Standard

- Preparation of the instructors in regards to the tight time available for research about organizations.
- Better to choose those who have no knowledge of documentaries in order for them to learn more about documentaries.

23. In your opinion, was there balance between theoretical information and practical training within the program?

- Certainly
- In general practical training is always more compelling, focused in order to enable the theoretical part to cover the practical application.
- Certainly, the proof of that was our satisfaction during filming and the directing of a distinct film based on the theoretical material.
- The balance was great since we benefited from the theoretical information during the practical training and responsibility of the film.
- Yes, for all of us learned theoretical aspects and acquired practical aspects.
- There was a large balance between the theoretical and practical since we applied everything we learned in a real life scenario.
- The balance was large since we all returned to the theoretical information in every aspect we undertook during the practical training. This helped us very much in directing our films and was a great reference to us.
- Yes and the follow-up by the editor with our work step by step helped in cementing the theoretical information.

24. Which aspect of the training or included topics regarding the production of documentaries about social issues was of most benefit from your perspective?

- All (2).
- Pitching the film was one of the foundational subjects that I learned and believe in its importance. (2).
- Story line (whale).
- Choice of the issue and personality.
- Research about the character.
- The training on preparation and research before the workshop and the division of intensifying parts of the film is something that helped us with the know-how in making documentaries.
- The work on stories and films of benefit to the society and we benefited from the research and working on the film.
- All of us benefited but the most important is the way to find the story which will draw you into the situation or the organization.
- The practical training and the affiliation with social organizations and social issues benefited us all from many angles.
- Presentation of the film idea.
- Pitching.

Reaction Form – Standard

- The hanging part of entrance into the documentary through personality or character.
- The understanding that a documentary is to cover a social issue doesn't necessarily have to be an issue or problem but could be a positive picture of something good and not something bad.

25. As a result of the training, how do you assess your interest in producing documentaries about social issues in the future?

- Good (2)
- Very good
- From my perspective the training was fundemental in greater in this type of films.
- It was shown to me through my abilities that stories of organizations and delivering information through documentaries is very interesting.
- This is an important topic which needs focus because it helps with the majority of problems which Jordan suffers from.
- I became to take interest in this type of films and my focus increased regarding making more of these in the future.
- Large interest, since through the filming of our films and before the end we were observing the need for another film for these films speak to many levels of the society regarding differences of levels, issues and their importance.
- My active interest increased greatly.
- Great result. I didn't think I was able to inform the society but I believe this as a result of the workshop.
- Big interest since this is of benefit in moving organizations products and civil society issues to other organizations and this becomes one circle of help in developing the society and its organizations so the subject needs completion through documentaries.

Example 5.3

Discussion Group Guide – Reaction

[Training Topic]

Discussion Group Instructions:

- The interviewer should not be a trainer or administrator of the training program.
- The interviewer should review the purpose of the discussion group.
- The interviewer should clarify that names of trainees will not be recorded with the comments.

Training Project Objectives

1. To what extent were the training objectives made clear at the start of the program?
2. To what extent were the training objectives achieved during the program?

Training Content

3. How relevant was the training material to your work or everyday life?
4. To what degree did the training material satisfy your professional needs?
5. In your opinion, how was the balance between theoretical and practical training within the program?
6. In your opinion, what role did the case studies and group exercises play in your learning during the program?

Trainers

7. Please provide your positive and negative observations regarding the program trainers.

Logistics

8. How did the choice of location affect the training program, in your opinion?
9. How would you rate the refreshments and food during the training program?

General

10. What were the strongest aspects of the training program?
11. How could the training program be improved in the future?

Example 5.4

Discussion Group - Notes Recording - Reaction

[Name of Training]

Training Project Objectives

1. To what extent were the training objectives made clear at the start of the program?
2. To what extent were the training objectives achieved during the program?

Training Content

3. How relevant was the training material to your work or everyday life?
4. To what degree did the training material satisfy your professional needs?
5. In your opinion, how was the balance between theoretical and practical training within the program?
6. In your opinion, what role did the case studies and group exercises play in your learning during the program?

Trainers

7. Please provide your positive and negative observations regarding the program trainers.

Logistics

8. How did the choice of location affect the training program, in your opinion?
9. How would you rate the refreshments and food during the training program?

General

10. What were the strongest aspects of the training program?
11. How could the training program be improved in the future?

Example 5.5

Intervention Tracking Form

Training Program Title: NGO Donor Management Training
Training Program ID #: 0012-09
Duration of Program: 1-Jan-09 to 30-Jan-09

Intervention Details						
#	Log Date	Component to be Modified	Approved By	Intervention	Person Responsible	Completion Date
1	15/01/2009	Training Location	Janette Smith	Determine new training location prior to 2nd workshop	John Smith	18/01/2009
2	15/01/2009	Handouts	Janette Smith	Bind all handouts into a single package for distribution at the 2nd workshop	Smith Smith	20/01/2009
3	15/01/2009	Financial management trainer	Janette Smith	Terminate training contract with initial trainer and find replacement prior to the 2nd workshop	John Smith	

Example 5.6

Checklist – Interpersonal Communication – HIV AIDS

Illustrative Checklist
Quality-Assurance for Interpersonal Communication[1]

No.	Quality-assurance Questions	Yes	No
1	Was the place as cool and airy as possible?		
2	Was the audience sitting comfortably on seats or mats, for indoor meetings, or sitting under shade, for outdoor meetings?		
3	Was the audience arranged in a horseshoe, within 5 meters of the presenters for lectures or discussion and within 7 meters for participatory activities?		
4	Were there at least 10 people in the audience, excluding the presenter/ facilitator(s)?		
5	Did the presenter/facilitator(s) talk loudly enough for the audience to hear?		
6	Did the audience listen quietly, when the presenter/facilitator(s) spoke, and were disruptive or drunk people silenced?		
7	If there was a lecture, was it no longer than 10 minutes?		
8	Was there a least one participatory activity, followed by a discussion?		
9	Did the audience show visible enthusiasm during the participatory activity?		
10	Was all the factual information that was presented in the lecture, participatory activity or discussion, accurate and up-to-date?		
11	Did the lecture and/or participatory activity avoid blaming women for the spread of HIV?		
12	Were there at least 20 minutes, preferably 30 minutes, for discussion?		
13	Did at least 5, preferably 10, members of the audience join in the discussion?		
14	Was the number of women contributing to the discussion proportionate to the number of women in the audience?		
15	During the discussion, did the presenter/facilitator(s) listen to each comment without showing facial disapproval or interrupting (except where the speaker was drunk or deliberately disruptive)?		

1 Monitoring and Evaluation Operations Manual, National AIDS Councils. World Bank, Joint United Nations Program on HIV/AIDS (UNAIDS) 2002.

Example 5.7

Post-Program Survey Questionnaire – Trainee

The purpose of this questionnaire is to determine the extent to which those who attended the Film Workshop for Documentary Creation have applied the principles and techniques. The result of this survey will help us to assess the effectiveness of the program and discover ways for it to be made more practical in the future. Please provide honest answers. Your name is optional. We might want to follow-up on your answers to get more comments and suggestions from you.

Please circle the appropriate response for each question:

5 = Much more   4 = Some more   3 = The same   2 = Some less   1 = Much less

Technical Components	Focus and importance given after the program compared to focus and importance before the program				
1. Documentary 3 – act structure	5	4	3	2	1
2. Film research	5	4	3	2	1
3. Character development	5	4	3	2	1
4. Pitching the story	5	4	3	2	1
5. Interviewing	5	4	3	2	1
6. Story development – the whale	5	4	3	2	1
7. Camera operation techniques	5	4	3	2	1
8. Lighting techniques	5	4	3	2	1
9. Sound techniques	5	4	3	2	1
10. Filming social issues	5	4	3	2	1

Example 5.8

Post-Program Survey [Trainee Version]

Name:____ Date:____________

This survey is designed to describe your experience regarding the application of qualitative research methods (focus groups) since completing the qualitative research methods training.

Since attending the qualitative research training,	Much better	Somewhat better	No change	Somewhat change	Much Worse	Don't know
1. How would you rate your comfort level with qualitative research methods? Comments:	6	5	4	3	2	1
2. How effective are you at preparing research (designing a research purpose, writing research objectives and questions)? Comments:	6	5	4	3	2	1
3. How would you describe your ability to recruit participants (identifying purposive profiles, writing screeners and physically recruiting)? Comments:	6	5	4	3	2	1
4. How is your ability to write a focus group discussion guide? Comments:	6	5	4	3	2	1
5. How is your ability to moderate a focus group? Comments:	6	5	4	3	2	1
6. How effective are you at focus group analysis techniques? Comments:	6	5	4	3	2	1
7. How effective are you at communicating the benefits of qualitative research techniques to your organization? Comments:	6	5	4	3	2	1

Example 5.9

Post-Program Survey [Manager or Colleague Version]

Name:______________________________ Date:__________

This survey is designed to describe your experience with your colleague regarding their application of the methodology since they completed the qualitative research methods training. Please answer the questions by identifying the number that corresponds to your response.

	Much better	Somewhat better	No change	Somewhat change	Much Worse	Don't know
Since attending the qualitative research training,						
1. How would you rate their comfort level with qualitative research methods? Comments:	6	5	4	3	2	1
2. How effective are they at preparing research (designing a research purpose, writing research objectives and questions)? Comments:	6	5	4	3	2	1
3. How would you describe their ability to recruit participants (identifying purposive profiles, writing screeners and physically recruiting)? Comments:	6	5	4	3	2	1
4. How is their ability to write a focus group discussion guide? Comments:	6	5	4	3	2	1
5. How is their ability to moderate a focus group? Comments:	6	5	4	3	2	1
6. How effective are they at focus group analysis techniques? Comments:	6	5	4	3	2	1
7. How effective are they at communicating the benefits of qualitative research techniques to your organization? Comments:	6	5	4	3	2	1

Example 5.10

Discussion Guide - Qualitative Research Training

Discussion Group – Discussion Guide

Discussion Group Instructions:

- The interviewer was not a trainer or administrator of the training program.
- The interviewer reviewed the training objectives and goals with the trainees.
- The interviewer clarified that the results were confidential.

Objective 1: Capacity enhancement of NGOs and researchers.

1. For the NGO representatives among us, how has this training program expanded your understanding of the technical components involved in implementing focus groups from the beginning to end?
2. For the Young Researchers among us, how has this training program expanded your understanding of the technical components involved in implementing focus groups from the beginning to end?
3. What aspects from this training program do you believe will have immediate positive impact on your current organization or future work?

Objective 2: Create opportunities for NGO – stakeholder dialogue.

4. Please express how the preparation and interaction with the stakeholders during this training program is different than past focus group activities you participated in? Please give us positive and negative differences.
5. How do you think, this training program will help you plan for your future programs based on the views and needs of your stakeholders?

Objective 3: Theoretical/Practical balance within the training content & organization

6. How would you rate and describe the practical learning component of this training program? The practical learning component includes the work groups, assignments between workshops, progress reports, the live focus groups and the writing of the final report.
7. How did the practical learning aspect give you opportunity to apply the theoretical concepts you discussed?

Title Page

Impact Implementing AIDS Prevention and Care Project

Jordan Final Report

Submitted to USAID
By Family Health International
December 2007

Family Health International
2101 Wilson Boulevard, Suite 700
Arlington, VA 22201
Telephone: 703-516-9779
Fax: 703-516-9781

In partnership with

Institute for Tropical Medicine
Management Sciences for Health
Population Services International
Program for Appropriate Technology in Health
University of North Carolina at Chapel Hill

Family Health International

Table Of Contents

Example 5.13

Acronyms

ADB	Asian Development Bank
ADRA	Adventist Development and relief Agency, Australia
AKRSP	Aga Khan Rural support Program
BADSP	Brong Ahafo Rural District Support Project, Ghana
CCDB	Christian Commission for Development in Bangladesh
CRS	Catholic Relief Services
DFID	Christian Commission for Development, UK
IDSS	International Development Support Services, Australia
M&E	Monitoring & Evaluation
MSC	Most Significant Change (MSC) Technique
NGO	Non-Government Organization
ONZB	Oxfam New Zealand
SC stories	Significant Change Stories
VSO	Voluntary Service Overseas

Example 5.14

Stakeholders Communication Preference Record

Project #: 112-2010
Project Name: Diabetes Prevention Training for the Elderly

#	Stakeholder Group	Preferred Com Channel	Individuals to Receive Communications	Responsible Person
1	Jordan Community Health Management	Email	John Smith	Lulu Smith
			Janette Smith	
			Jim Smith	
		Hardcopy	Janette Smith	Lulu Smith
			Jim Smith	
		Presentation	John Smith	Jack Brown
			Janette Smith	
			Jim Smith	
			Bob Smith	
		Intranet		Lulu Smith
2	World Health Organization	Email	Jim Smith	Lulu Smith
			Jill White	
			John White	
		Presentation	Jim Smith	Jack Brown
			Jill White	
			John White	
3	Hashemia elderly community	Community group meeting		Janette Brown
4	Hashemia Society for the Elderly	Hardcopy	John Brown	Lulu Smith
5	General Public	Org website		Lulu Smith
		Portal link	WHO website	Lulu Smith
			Diabetes.com	Lulu Smith
		Newspaper	Al Ghad	Jack Brown
			Ad-Dustour	Jack Brown
			Al Rai	Jack Brown

Example 5.15

Stakeholders Communication Preference Checklist

Project #: 112-2010
Project Name: Diabetes Prevention Training for the Elderly
Communication: Final Training Report

√	Stakeholder Group	Preferred Com Channel	Individuals to Receive Communications	Responsible Person	Completion Date
√	Jordan Community Health Management	Email	John Smith	Lulu Smith	07/01/2010
√			Janette Smith		07/01/2010
√			Jim Smith		07/01/2010
√		Hardcopy	Janette Smith	Lulu Smith	07/01/2010
√			Jim Smith		07/01/2010
		Presentation	John Smith	Jack Brown	
			Janette Smith		
			Jim Smith		
			Bob Smith		
		Intranet		Lulu Smith	
√	World Health Organization	Email	Jim Smith	Lulu Smith	07/01/2010
√			Jill White		07/01/2010
√			John White		07/01/2010
		Presentation	Jim Smith	Jack Brown	
			Jill White		
			John White		
	Hashemia elderly community	Community group meeting		Janette Brown	
√	Hashemia Society for the Elderly	Hardcopy	John Brown	Lulu Smith	10/01/2010
	General Public	Org website		Lulu Smith	
√		Portal link	WHO website	Lulu Smith	10/01/2010
√			Diabetes.com	Lulu Smith	10/01/2010
		Newspaper	Al Ghad	Jack Brown	
			Ad-Dustour	Jack Brown	
			Al Rai	Jack Brown	

Template 5.1

Training Evaluation Plan Tracking Form

Training Program Title: ____

Training Program ID #: ____

Duration of Program: ____

Training Objectives:

Level	Objectives
Level 4: Evaluating Organization/Community Results	
Level 3: Evaluating Behavioral Change	
Level 2: Evaluating Knowledge Development	
Level 1: Evaluating Reaction	

Evaluation Activities:

Stage	Program Activities	Evaluation Type	Evaluation Technique	Date	Responsible Person	Level of Evaluation	Notes

Template 5.2

Training Program Reaction Form

Please provide your honest feedback regarding the effectiveness of the program in meeting your needs. Your responses will help us to maintain and improve the quality and relevance of future training programs.

Please circle your response to each statement.	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable
1. The workshop's objectives were clearly stated.	1	2	3	4	5	0
2. The workshop's objectives were achieved.	1	2	3	4	5	0
3. The workshop's outline and schedule was clear to me.	1	2	3	4	5	0
4. The workshop covered what I expected it to cover.	1	2	3	4	5	0
5. The workshop's content was interesting.	1	2	3	4	5	0
6. The workshop satisfied my professional needs in this area.	1	2	3	4	5	0
7. The level of interactivity was appropriate for this workshop.	1	2	3	4	5	0
8. The trainer(s) was/were effective.	1	2	3	4	5	0
9. The supporting resource materials supplied (or referred to) are relevant and useful to me.	1	2	3	4	5	0
10. The transportation provided was appropriate.	1	2	3	4	5	0
11. The facilities provided a suitable environment for training?	1	2	3	4	5	0

Template 5.2

Training Program Reaction Form

Please circle 'Yes' or 'No' to the following statements			If 'No' please comment
12. The duration of the workshop was right for me.	Yes	No	
13. The pace of the workshop was right for me.	Yes	No	
14. The level of difficulty of the content was right for me.	Yes	No	

15. Please write the training program's areas of strength from your point of view.

16. Please write the training program's areas of weakness from your point of view.

17. What aspect of the training program was most beneficial for you?

18. What aspect of the training program was most difficult for you to follow? What made it difficult?

19. How can we improve this training program?

Template 5.3

Training Program Reaction Form Standard Smiley

Please provide your honest feedback regarding the materials, facilities and refreshments provided during the training program. Your responses will help us to maintain and improve the quality and relevance of future training programs.

Provide your comment by ticking the face which best represents your feelings about the following:

The training facilities	Very Good	Good	Average	Poor
1. The training room's chairs and tables were comfortable.				
2. The temperature in the training room.				
3. The lighting within the training room.				
4. The training equipment (laptops, projector, flip-charts…etc.).				
5. Space provided for group work sessions.				

The refreshments provided	Very Good	Good	Average	Poor
6. The selection of refreshments during coffee breaks.				
7. The lunch/dinner choices provided.				
8. The service provided by the wait staff.				

Training Program Reaction Form

The materials provided	Very Good	Good	Average	Poor
9. The physical quality of the materials provided to participants.				
10. The practical nature of the materials.				
11. The content of the materials.				
12. The amount of materials.				

13. How can this program be improved in the future?

Template 5.4

Reaction Form – Customized – Template

[Training Program Title]
[Date of the Program]
Reaction Form

In order to determine the effectiveness of our program in meeting your needs and interests, we need your input. Please provide us with your reactions, and make any comments or suggestions that will help us serve you better.

Instructions: Place an X in the column 1, 2, 3 or 4 to indicate our evaluation of each item.

		Negative			Positive
Introduction and Training Objectives		1	2	3	4
1.	Appropriate				
2.	Organized to facilitate learning				
3.	Clearly stated				
4.	Agenda encouraged participant involvement				
5.	Sessions/exercises helped accomplish overall objectives				

Comments:

		Negative			Positive
Session 1:		1	2	3	4
6.	Organized				
7.	The organization helped facilitate discussion between trainees				
8.	Session time was adequate				
9.	Content of the session was appropriate				

Comments:

Reaction Form – Customized – Template

Session 2:		Negative 1	2	3	Positive 4
10.	Organized				
11.	The organization helped facilitate discussion between trainees				
12.	Session time was adequate				
13.	Content of the session was appropriate				

Comments:

Session 3:		Negative 1	2	3	Positive 4
14.	Organized				
15.	The organization helped facilitate discussion between trainees				
16.	Session time was adequate				
17.	Content of the session was appropriate				

Comments:

Training Content		Negative 1	2	3	Positive 4
18.	Accurate				
19.	Current				
20.	Adequate in scope				
21.	Sequenced properly				

Comments:

Template 5.4

Reaction Form – Customized – Template

Training Setting		Negative 1	2	3	Positive 4
22.	Comfortable				
23.	Quality materials and visual aids				
24.	Adequate equipment				
25.	Administrative support				

Comments:

Trainer: Jack Smith's Delivery		Negative 1	2	3	Positive 4
26.	Effective presentation style				
27.	Preparation/knowledge of material				
28.	Actively solicited participation				
29.	Respectful of participant contributions				

Comments:

30. What are the points of strength of the training program?

31. What are the points of improvement for the training program?

32. What aspect of the training program was most beneficial for you?

33. Specific program question 1

34. Specific program question 2

Template 5.5

Reaction Form – Customized Summary Template

[Training Program Title]
[Date of the Program]
Reaction Form

In order to determine the effectiveness of our program in meeting your needs and interests, we need your input. Please provide us with your reactions, and make any comments or suggestions that will help us serve you better.

Instructions: Place an X in the column 1, 2, 3 or 4 to indicate our evaluation of each item.

		Negative			Positive	
Introduction and Training Objectives		1	2	3	4	Rating
1.	Appropriate					
2.	Organized to facilitate learning					
3.	Clearly stated					
4.	Agenda encouraged participant involvement					
5.	Sessions/exercises helped accomplish overall objectives					
				Overall Rating		

Comments:

		Negative			Positive	
Session 1:		1	2	3	4	Rating
6.	Organized					
7.	The organization helped facilitate discussion between trainees					
8.	Session time was adequate					
9.	Content of the session was appropriate					
				Overall Rating		

Comments:

Template 5.5

Reaction Form – Customized Summary Template

Session 2:		Negative 1	2	3	Positive 4	Rating
10.	Organized					
11.	The organization helped facilitate discussion between trainees					
12.	Session time was adequate					
13.	Content of the session was appropriate					
				Overall Rating		

Comments:

Session 3:		Negative 1	2	3	Positive 4	Rating
14.	Organized					
15.	The organization helped facilitate discussion between trainees					
16.	Session time was adequate					
17.	Content of the session was appropriate					
				Overall Rating		

Comments:

Training Content		Negative 1	2	3	Positive 4	Rating
18.	Accurate					
19.	Current					
20.	Adequate in scope					
21.	Sequenced properly					
				Overall Rating		

Comments:

Template 5.5

Reaction Form – Customized Summary Template

Training Setting		Negative 1	2	3	Positive 4	Rating
22.	Comfortable					
23.	Quality materials and visual aids					
24.	Adequate equipment					
25.	Administrative support					
				Overall Rating		

Comments:

Trainer: Jack Smith's Delivery		Negative 1	2	3	Positive 4	Rating
26.	Effective presentation style					
27.	Preparation/knowledge of material					
28.	Actively solicited participation					
29.	Respectful of participant contributions					
				Overall Rating		

Comments:

30. What are the points of strength of the training program?

31. What are the points of improvement for the training program?

32. What aspect of the training program was most beneficial for you?

33. Specific program question 1

34. Specific program question 2

Template 5.6

Training Program Reaction Form

Please provide your honest feedback regarding the effectiveness of the program in meeting your needs. Your responses will help us to maintain and improve the quality and relevance of future training programs.

Please circle your response to each statement.	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable	Rating
1. The workshop's objectives were clearly stated.							
2. The workshop's objectives were achieved.							
3. The workshop's outline and schedule was clear to me.							
4. The workshop covered what I expected it to cover.							
5. The workshop's content was interesting.							
6. The workshop satisfied my professional needs in this area.							
7. The level of interactivity was appropriate for this workshop.							
8. The trainer(s) was/were effective.							
9. The supporting resource materials supplied (or referred to) are relevant and useful to me.							
10. The transportation provided was appropriate.							
11. The facilities provided a suitable environment for training?							

Training Program Reaction Form

Please circle 'Yes' or 'No' to the following statements	Yes	No	If 'No' please comment
12. The duration of the workshop was right for me.			
13. The pace of the workshop was right for me.			
14. The level of difficulty of the content was right for me.			

15. Please write the training program's areas of strength from your point of view.

16. Please write the training program's areas of weakness from your point of view.

17. What aspect of the training program was most beneficial for you?

18. What aspect of the training program was most difficult for you to follow? What made it difficult?

19. How can we improve this training program?

Template 5.7

Intervention Tracking Form

Training Program Title: ____
Training Program ID #: ____
Duration of Program: ____

Intervention Details

#	Log Date	Component to be Modified	Approved By	Intervention	Person Responsible	Completion Date

Template 5.8

Pre-Self-Assessment

[Training Title]

Date: ____

Trainee Knowledge/Skill Level: Self-Assessment

F = Unaware/unskilled
D = Minimal awareness/rudimentary skill
C = Partial Knowledge/Semi-skilled
B = Working knowledge & skill level
A = Expert knowledge/Highly skilled

Instructions: For the following training topics mark your level of knowledge:

Training Topics		F	D	C	B	A
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

Template 5.9

Post-Self-Assessment

[Training Title]

Date: ______________________________

Trainee Knowledge/Skill Level: Self-Assessment

F = Unaware/unskilled
D = Minimal awareness/rudimentary skill
C = Partial Knowledge/Semi-skilled
B = Working knowledge & skill level
A = Expert knowledge/Highly skilled

Instructions: For the following training topics mark your level of knowledge:

Training Topics		F	D	C	B	A
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

Template 5.10

Pre-Post-Self-Assessment Analysis

TRAINING BEFORE/AFTER SELF ASSESSEMENT

[Training Title]

Trainee Knowledge/Skill Level: Self-Assessment

F = Unaware/unskilled
D = Minimal awareness/rudimentary skill
C = Partial Knowledge/Semi-skilled
B = Working knowledge & skill level
A = Expert knowledge/Highly skilled

TRAINING OBJECTIVE
AT LEAST 85% OF PARTICIPANTS
AT THE b LEVEL OR BETTER
IN EACH OF THE KEY TOPICS
BY THE END OF THE COURSE

TOPIC			% Participants at Level						% ATTAINED	COMMENT
			NA	F	D	C	B	A		
1		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
2		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
3		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
4		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
5		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
6		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
7		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
8		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
9		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
10		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL

Pre-Post-Self-Assessment Analysis

11		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
12		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
13		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
14		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
15		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
16		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
17		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
18		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
19		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
20		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
21		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0	zero	SUCCESSFUL
22		Pre	0	0	0	0	0	0	zero	
		Post	0	0	0	0	0	0		
23	10 = N (end)	Pre								
N=	10 = N	Post								
	Overall Summary	Pre		0	0	0	0	0		
	Percentage	Post		0	0	0	0	0		SUCCESSFUL

NOTE: Due to rounding, totals of F,D,C,B & A may not always add up to 100%

Direct Observation Checklist – Format 1

No.	Questions or Components	Yes	No
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Template 5.12

Direct Observation Checklist – Format 2

Yes	Questions or Components	No

Template 5.13

Post-Program Survey

[Trainee Version]

Name:____ Date:____________

This survey is designed to describe your experience regarding the application of principles and techniques since completing [NAME OF THE TRAINING].

Since attending [NAME OF THE TRAINING],	Much better	Somewhat better	No change	Somewhat change	Much Worse	Don't know
1. Question Comments:	6	5	4	3	2	1
2. Question Comments:	6	5	4	3	2	1
3. Question Comments:	6	5	4	3	2	1
4. Question Comments:	6	5	4	3	2	1
5. Question Comments:	6	5	4	3	2	1
6. Question Comments:	6	5	4	3	2	1
7. Question Comments:	6	5	4	3	2	1

Template 5.14

Post-Program Survey

[Manager or Colleague Version]

Name:____ Date:____________

This survey is designed to describe your experience with your colleague regarding the application of since their completing [NAME OF TRAINING]. Please answer the questions by identifying the number that corresponds to your response.

Since attending [NAME OF THE TRAINING],	Much better	Somewhat better	No change	Somewhat change	Much Worse	Don't know
1. Question Comments:	6	5	4	3	2	1
2. Question Comments:	6	5	4	3	2	1
3. Question Comments:	6	5	4	3	2	1
4. Question Comments:	6	5	4	3	2	1
5. Question Comments:	6	5	4	3	2	1
6. Question Comments:	6	5	4	3	2	1
7. Question Comments:	6	5	4	3	2	1

Patterned Interview

Interview Instructions:

- Interviewer reviews the program and behaviors that are encouraged with the trainee(s).
- Interviewer clarifies the purpose of the interview – effectiveness of the training, extent of application of behaviors.
- Interviewer clarifies that the results are confidential.

1. What specific principles, concepts and behaviors did you learn during the training?

2. When you completed the program, how eager were you to apply the principles in your work?

________Very eager ________Quite eager ________Not eager

Comments:

3. How well equipped were you to do what was suggested?

________Very ________Quite ________Little ________None

4. If you are NOT applying some of the principles you learned, why not?

	How Significant?		
	Very	To some extent	Not
a. It wasn't practical for my situation.			
b. My organization's culture doesn't promote change.			
c. I have not found the time.			
d. I tried it, and it didn't work.			
e. Other reasons.			

5. To what extent do you plan to do things differently in the future?

________Large extent ________Some extent ________No extent

6. What suggestions do you have for making the program more helpful?

Template 5.16

Final Evaluation Report

Training Program Title: ______________________________

Program Director: ______________________________

Lead Trainer: ______________________________

Dates of Program: ______________________________

Date of Submission: ______________________________

1. Evaluation Level Results

Level 1: Reaction Results

•

Level 2: Knowledge Development Results

•

Level 3: Behavioral Change Results

•

Level 4: Organization or Community Results

•

2. Comments from Trainees and Other Sources

Trainees

•

Other Sources

•

3. Factors of Successful/Unsuccessful Achievement

•

Template 5.17

Training Report

Organization Logo

Final Report
[Title of the Training Program]
[Dates of the Training Program]

Funding provided by [Name of the Donor Organization]
[Type and number of agreement]
[Additional required contract numbering information]

Submitted by:
[Name of Your Organization]

_ _ _ _
[City/Country of Your Organization]
[Date of Submission]

Submitted to:

[Name of Person 1]	[Name of Person 2]	[Name of Person 3]
[Title of Person 1]	[Title of Person 2]	[Title of Person 3]
[Organization Name]	[Organization Name]	[Organization Name]

Template 5.17

Training Report

Table of Contents

Template 5.17

Training Report

Acronyms

[Acronym 1]	[Meaning 1]
[Acronym 2]	[Meaning 2]
[Acronym 3]	[Meaning 3]

Training Program Picture

Final Report – [Name of the Training Project]

Overview

[INSERT THE PROJECT INTRODUCTION]

Executive Summary

[INSERT THE EXECUTIVE SUMMARY]

Training Objectives

[INSERT THE TRAINING OBJECTIVES]

Training Participants Picture

Participants

[INSERT THE PARTICIPANT INFORMATION]

Template 5.17

Training Report

Methodology and Resources

[INSERT THE METHODOLOGY AND MATERIALS INFORMATION]

Evaluation

[INSERT THE EVALUATION RESULTS]

Training Report

Success Stories

[INSERT THE SUCCESS STORIES]

Success Story 1
Picture

Success Story 2
Picture

Success Story 3
Picture

Training Report

Appendices

Appendix 1

[INSERT APPENDIX 1 INFORMATION]

Appendix 2

[INSERT APPENDIX 2 INFORMATION]

Template 5.18

Stakeholders Communication Preference Record

Project #: ____

Project Name: ____

Instructions: This form should be used to record the preferred communication channels for each stakeholder for any training program. The record channels should be used for all formal communications about the project.

#	Stakeholder Group	Preferred Com Channel	Individuals to Receive Communications	Responsible Person
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Template 5.19

Stakeholders Communication Preference Checklist

Project #: ____

Project Name: ____

Communication: ____

Instructions: This form is a record the completion of communication to all project stakeholders according to their preferred communication channels.

√	Stakeholder Group	Preferred Com Channel	Individuals to Receive Communications	Responsible Person

The NGO contributes to advocacy and civil society developmental issues, w
funds to carry its operation. The NGO strategy influences how the NGO uses
funds) and human capital (employees).
The Training function at the NGO exists to support and reinforce its strateg
local communities is crucial in the fulfillment of the NGO objectives. The NGO
statements of the NGO, and need to revise these statements annually. In revis
NGO's function is still consistent with its Mission and with the community's
Your Personal Development Plan should reflect the activities
your personal objectives. Such a plan may be
NGO (part of the Performance Management
have to design your own. The plan's
improve your
performance
your current
position
and

le
activiti
Starting
puzzle. In
the business
training.
Context Analy

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fhi360 THE SCIENCE OF IMPROVING LIVES