

# Manual for Training of Trainers

Effective Training Management and Training Delivery Techniques

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replaced by designed one.**

Training of Trainers Course for Sierra Leone and Liberia

Civil Service Training Centre, Ghana

February, 2013

<b>Version</b>	<b>Date</b>
Draft Version 1	February 2012
Draft Version 2 For Preparation of TOT Course	July 2012
Version 3	August 2012
Version 4	February 2013

Project for Institutional Capacity Development of the Civil Service Training Centre

Government of Republic of Ghana

Japan International Cooperation Agency (JICA)

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## Introduction

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This manual provides Facilitators of the Ethical Leadership for Quality Productivity Improvement Course with fundamental training skills and know-how for an effective course delivery. It explains basics of Instructional Design (ID) as systematic training management and techniques of training delivery that are common to any training course. This is especially important for new facilitators to obtain basic skills for preparing and facilitating sessions of the course as well as new training managers for managing training courses. This is also useful for experienced facilitators and managers because this part will enable them to review the experiences of facilitation and management in a systematic manner and improve their skills.

It includes many appendices to support application of knowledge to actual context.

## Effective Training Management and Training Delivery Techniques



### Learning point

This manual provides facilitators and training managers with information on how to develop, deliver and manage training activities in an effective manner, using the instructional design approaches. The modules are in accordance with the ADDIE Process, i.e. 1) Training Needs Analysis, 2) Design, 3) Resource Development, 4) Implementation and 5) Evaluation with introductory module of Human Resource Development framework

You will learn what training is in reference to the HRD framework, the outline of ADDIE Process Model and how to apply it to actual training programmes in each phase of the ADDIE process. These are the common knowledge and skills required for quality training. By learning these, **you will be able to manage training as well as design and facilitate your session(s) in an effective manner based on the ID approaches.**

#### List of modules

Module-1: Human Resource Development (HRD) Framework

Module-2: ADDIE Process Model

Module-3: Phase-1: Training Needs Analysis

Module-4: Instructional Design Basics

Module-5: Phase-2: Training Programme Design -Curriculum Design

Module-6: Phase-2: Training Programme Design -Lesson Plan Development

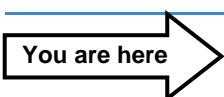
Module-7: Phase-3: Training Resource Development

Module-8: Phase-4: Training Implementation -Training Delivery

Module-9: Phase-4: Training Implementation -Classroom Facilitation

Module-10: Phase-5: Training Evaluation

## Module-1 Human Resource Development (HRD) Framework



Module-1	Human Resource Development (HRD) Framework
Module-2	ADDIE Process Model
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
Module-5	Phase-2: Training Programme Design –Curriculum Design
Module-6	Phase-2: Training Programme Design –Lesson Plan Development
Module-7	Phase-3: Training Resource Development
Module-8	Phase-4: Training Implementation –Training Delivery
Module-9	Phase-4 Training Implementation –Classroom Facilitation
Module-10	Phase-5: Training Evaluation

### Learning Point of This Module

In this module, you will be introduced to the Human Resource Development (HRD) framework within a bigger framework of Human Resource Management (HRM), based on which training and development activities are developed. Similarly this module will explain training within the context of HRD to enable you understand that training as a single factor does not lead to positive results but also requires a favourable environment that supports the training towards a positive impact on improving organizational performance.

At the end of this module, **you will be able to**

- **Explain what training is within the context of HRD and HRM**
- **List key concepts for HRD paradigm shift**

List of contents of this module:

- 1.1 HRD and HRM
- 1.2 Training and Human Resource Development (HRD)
- 1.3 HRD Paradigm
- 1.4 for HRD Profession
- 1.5 Summary

### 1.1 HRD and HRM

**HRM is widely understood as a process of managing human talents to achieve organisation's objective** where as, **HRD is understood as a series of organised activities conducted within a**



**specified time and designed to produce behavioural change.** The table below summarizes a comparison between HRM and HRD.

Table: Comparison of HRM and HRD

HRM	HRD
<b>Definition:</b> HRM is a <u>process</u> of managing human talents to achieve organisation’s objective	<b>Definition:</b> HRD is a series of <u>organised activities</u> conducted within a specified time and designed to produce behavioural change
<b>Process:</b> <ol style="list-style-type: none"> <li>1. Recruitment and selection</li> <li>2. Compensation and benefits</li> <li>3. Labour and industrial relations</li> <li>4. Safety &amp; health management</li> </ol>	<b>Activities:</b> <ol style="list-style-type: none"> <li>1. Training and development</li> <li>2. Performance appraisals management</li> <li>3. Career planning and development</li> <li>4. Change management</li> </ol>

Source: “Evolving terms of human resource management and development “, Hashida A., 2009.

HRD supports HRM

There are two ways of explaining the relationship between HRD and HRM. One is that **HRD is a component of HRM and HRD supports HRM**, which was proposed by Guest, 1987. **HRD consists of four components, namely; 1) training and development, 2) performance appraisals and management, 3) career planning and development and 4) change management.** These four components are included in the HRM framework. This is described as the “HRM’s Wheel” as shown below.

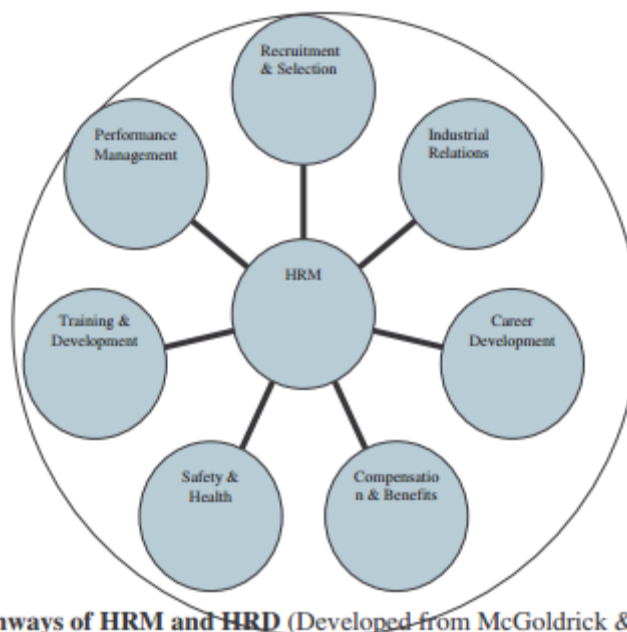


Figure: HRM's Wheel (Developed from McGoldrick & St...

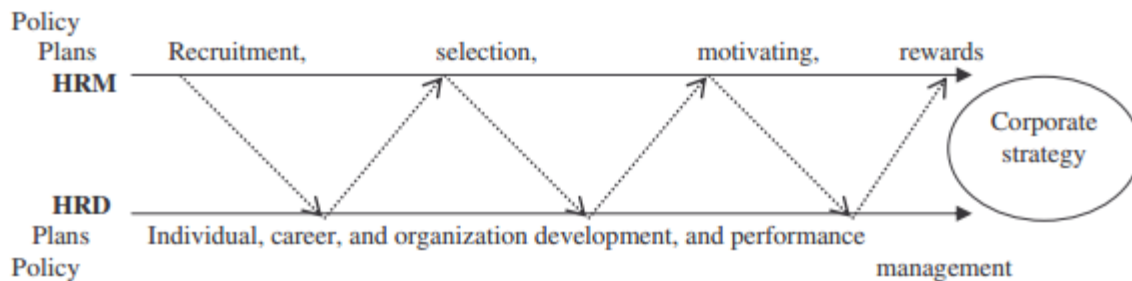
Figure: HRM’s Wheel

Source: “Evolving terms of human resource management and development “, Hashida A., 2009.

HRD supplements HRM

However, another explanation describes **HRD as supplementing HRM rather than supporting it.**

McGoldrick & Stewart (1996) posited that HRM and HRD are parallel pathways of HRM and HRD by saying that **HRM has the function of recruitment, selection, motivating and rewarding.** Whilst, **HRD's function is to provide learning, education and training to the human resources selected and recruited.** This concept is described in the chart below .



## 1.2 Training and Human Resource Development (HRD)

As stated earlier, HRD is a series of organised activities conducted within a specified time and designed to produce behavioural change. HRD is defined and interpreted in many ways by many scholars and academicians. Swanson and Holten (2001) defined HRD as “A process for developing and unleashing human experience through organisation development and personal training and development for the purpose of improving performance.” Mclean & Mclean (2001) defined HRD as “Human resource development is any process or activity that, either initially or over the long term, has the potential to develop adults’ work-based knowledge, expertise, productivity, and satisfaction, whether for personal or group/team gain, or for the benefit of an organisation, community, nation or ultimately, the whole community.” M. J. Arul (1989) defined HRD as “HRD is a set of inter-related activities, by which human potentialities are assessed, selectively upgraded and appropriately deployed for achievement of envisioned goals that foster human dignity.” **The American Society for Training and Development (ASTD) simply defines HRD as "HRD is the integrated use of training and development, organisational development, and career development to improve individual, group and organisational effectiveness."** In all these different definitions, training is identified as an important element of HRD. **ASTD identified 3 elements of HRD namely;**

- 1) **Training and development**
- 2) **Organisational development**
- 3) **Career development**

### Training and Development

Garavan, Costine, and Heraty (1995) identified that **training and development (T&D) include three main activities, namely 1) training, 2) education, and 3) development.** These activities are often considered to be synonymous. However, to practitioners, they encompass three separate, although interrelated, activities as outlined below:

- **Training:** This activity is both focused upon, and evaluated against, the job that an individual currently holds.
- **Education:** This activity focuses upon the jobs that an individual may potentially hold in the future, and is evaluated against those jobs.
- **Development:** This activity focuses upon the activities that the organization employing the individual, or that the individual is part of, may partake in the future, and is almost impossible to evaluate.

### Organisational Development

**Organizational Development (OD) involves activities to increase an organization's performance.** Emphasis is placed on how to cope with change and make organizations ready to meet the change. OD contributes to assisting organizations and individuals to cope with change. In other words, OD is the framework for a change process designed to lead to desirable positive impact on all stakeholders.

Cummings & Worley, (2001) defined OD as "Organization Development (OD) concerns system wide planned change, uses behavioral science knowledge, targets human and social process of organizations, and intends to build the capacity to adapt and renew organizations" In the OD approach, psychological and behavioral-science are fully utilized.

### Career Development

Career development focuses on individuals' progression in organizations. **It explains how individuals manage their careers within organizations and how organizations structure the career progression of their members.** This is the viewpoint of career development from the organizational development perspective. However, another viewpoint looks at the concept from the perspective of a personal life long career. Career progression occurs not only in one organization but can occur throughout one's life in the different organizations one works for.

It should be noted that **training programmes should be integrated into an overall HRD system. Similarly, HRD should be integrated into an overall HRM system.** A simple example of this concept is that an employee who is trained in Kaizen should be in an environment where the concept can be applied.

### 1.3 HRD Paradigm

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HRD is an old concept and has been defined in many ways until today. However, its focus has been changed according to the changing environment of businesses. In recent times, **HRD focuses much more on the individual aspects than organizational aspects, learning more than training, changing attitude than providing skills and knowledge, performance improvement than obtaining knowledge** and so forth. Some of the HRD related concepts that shows this paradigm shift in recent years are presented below.

Human Capital Management and Development

Human Capital Management and Development was advocated as an advanced concept of HRM and HRD in the late 1950s and has become popular since early 2000s. There are two key principles in it. The first principles states **people are assets whose value can be enhanced through investment**. This means the organizational value can be enhanced by increasing the value of members of the organization. The second principle states that **organization’s human capital policies must be aligned to support the organization’s shared vision**. **This paradigm shift from employees have been seen as costs to be cut to assets to be valued**. The value of the organization is dependent on the value of its people.

From Training to Learning

Finland achieved a top score in the Programme for International Student Assessment in 2006. Finland reformed its education system in 1994 by changing the essence of education from teaching to learning. It focuses on educating children to make them think and learn themselves for an independent personality. This competency contributes to shaping careers in a changing society. Similarly, the training field in industries also went through this paradigm shift from training to learning. Due to the fast changing environment of businesses, companies/organizations cannot obtain the necessary competencies by simply providing training to its employees through transfer of knowledge, skills and attitude on the spot. Rather, **companies/organizations need to create environments where employees can learn anytime when the need arises**. In a sophisticated and fast changing society, companies/organizations cannot afford to plan and conduct appropriate training to all the employees who have different roles and background. Contrary, employees take initiative to acquire the necessary competencies while the company/organization supports and facilitates those activities. The table below shows the difference between learning and training

Training		Learning
<ul style="list-style-type: none"> <li>● Demonstrate specific skills</li> <li>● Focus on techniques and process</li> <li>● Oriented toward specific tasks</li> <li>● Provide specific skills and knowledge</li> <li>● Instructor led</li> <li>● Organisational viewpoint</li> <li>● Short-term, when needed</li> </ul>	--> --> --> --> -->	<ul style="list-style-type: none"> <li>● Understand concept and context</li> <li>● Focus on developing judgment</li> <li>● Oriented toward transferable skills</li> <li>● Develop the person, not just the skills and knowledge</li> <li>● Participants centred</li> <li>● Individual viewpoint</li> <li>● Long-term, on-going</li> </ul>

Learning Organization

The Learning organization concept was advocated by Peter Senge (1990) as an evolved concept of organizational development theory. He defined it as **“an organization that is continually expanding its capacity to create its future.”** The learning organization concept helps managing organization to cope with various problems caused by the ever changing environment. He identified five disciplines for learning organizations as follows:

- **Personal mastery** --- It is the discipline of continually clarifying and deepening our personal vision, of focusing our energies, of developing patience, and of seeing reality objectively. Developing such personal mastery in every member in the organization is essential.
- **Mental models** --- It is deeply ingrained assumptions, generalizations, or even pictures of images that influence how we understand the world and how we take action. Challenging or clarifying such mental models and encouraging people to reframe them is essential.
- **Building shared vision** --- It is a practice of unearthing shared pictures of the future that foster genuine commitment and enrollment rather than compliance.
- **Team learning** --- It starts with dialogue, the capacity of members of a team to suspend assumptions and enter into genuine thinking together.
- **Systems thinking** --- It is a framework for seeing inter-relationships that underlie complex situations and interactions rather than simplistic linear cause-effect chains. This should contribute to integrating the four disciplines above for effective implementation of a learning organization.

### Workplace Learning (WPL)

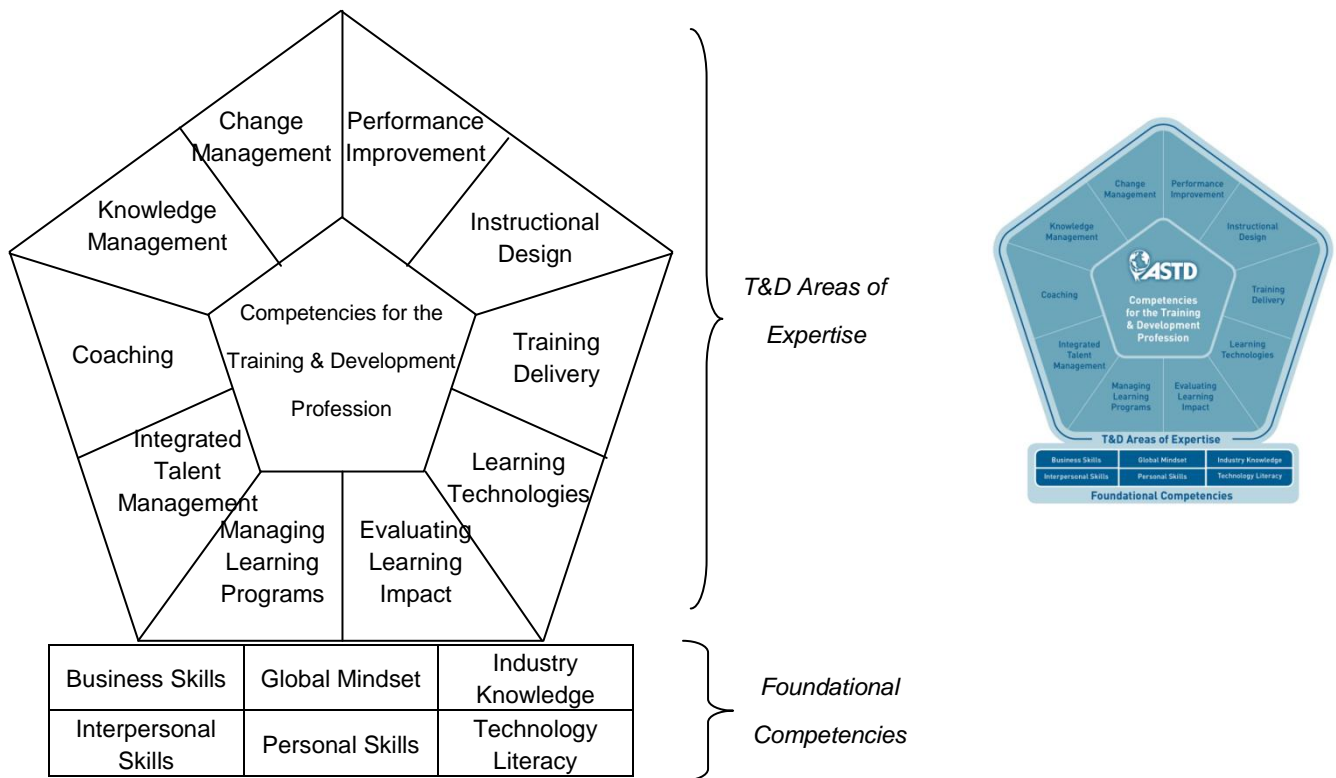
How to facilitate learning within workplaces (that is learning at and through work) has become a central concern in the HRD professionals recently. This is because companies and organizations are more conscious about making clear the direct impact of training on work performance. Traditionally, training was divided into two categories, namely On the Job and Off the Job Training. WPL facilitates Off the job training in workplaces by making direct linkages between training and the each one's job so that **On and Off the job are integrated. This impacts on job performance at the workplace.** In addition, **WPL involves various organizational activities to support the job such as mentoring, coaching, staff communication, knowledge management, etc.** Rothwell & Sredl (2000) defined it as "integrated approach of learning and other interventions for the sake of improving performance of an organization and its members."

**WPL provides a paradigm shift in the sense that it looks at the job as offering a training opportunity.** Training is not given for doing the job better but doing the job is considered training. Thus, WPL focuses on both formal and informal learning happening at the workplace.

### 1.4 Competencies for HRD Profession

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The American Society for Training & Development (ASTD) recently developed a new competency model called "The ASTD Competency Model, which redefines the skills and knowledge required for HRD professionals. As a professional in the HRD field, this model can be a guide to develop yourself. The chart below describes this model.



\* Source: <http://www.astd.org/Certification/Competency-Model>  
 The ASTD Competency Model is used with permission from ASTD.

### Competencies for the Training & Development Profession

Competencies for the Training & Development Profession are explained below.

- **Performance Improvement**  
Apply a systematic process for analyzing human performance gaps and for closing them.
- **Instructional Design**  
Design and develop informal and formal learning solutions using a variety of methods.
- **Training Delivery**  
Deliver informal and formal learning solutions in a manner that is both engaging and effective.
- **Learning Technologies**  
Apply a variety of learning technologies to address specific learning needs.
- **Evaluating Learning Impact**  
Use learning metrics and analytics to measure the impact of learning solutions.
- **Managing Learning Programs**  
Provide leadership to execute the organization's people strategy; implements training projects and activities.
- **Integrated Talent Management**  
Build an organization's culture, capability, capacity, and engagement through people

development strategies.

- Coaching

Apply a systematic process to improve others' ability to set goals, take action, and maximize strengths.

- Knowledge Management

Capture, distribute, and archive intellectual capital to encourage knowledge-sharing and collaboration.

- Change Management

Apply a systematic process to shift individuals, teams, and organizations from current state to desired state.

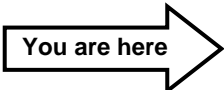
This Model provides a professional development blueprint for the learning professional, helps to prepare for the future faster, and identifies skill gaps and ways to close them. Details are described in the Website of ASTD (<http://www.astd.org/Certification/Competency-Model>). Some tools called "JOB AIDS" are also provided to apply this model to your organization.

## 1.5 Summary

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There are two ways to look at HRD and HRM. One is that HRD is a component of HRM and HRD supports HRM and the other one is HRD is supplementing HRM rather than supporting it. ASTD identified 3 elements of HRD namely, 1) Training and development, 2) Organisational development, 3) Career development. HRD concept has been developed by providing many models such as Human Capital Management and Development, From Training to Learning, Learning Organization, Workplace Learning (WPL), etc.

## Module-2 ADDIE Process Model



Module-1	Human Resource Development (HRD) Framework
<b>Module-2</b>	<b>ADDIE Process Model</b>
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
Module-5	Phase-2: Training Programme Design –Curriculum Design
Module-6	Phase-2: Training Programme Design –Lesson Plan Development
Module-7	Phase-3: Training Resource Development
Module-8	Phase-4: Training Implementation –Training Delivery
Module-9	Phase-4 Training Implementation –Classroom Facilitation
Module-10	Phase-5: Training Evaluation

### Learning Point of This Module

In this module you will be introduced to the ADDIE Process Model as an effective management process model for training programmes. The module will explain how the model helps to manage training, its contribution to the quality of the training and the capacity development of people involved in the training.

At the end of this module, **you will be able to**

- **Explain the ADDIE Process Model**
- **Explain what is to be done in each phase of the ADDIE Process**
- **Explain the benefits of the ADDIE Process**

List of contents of this module:

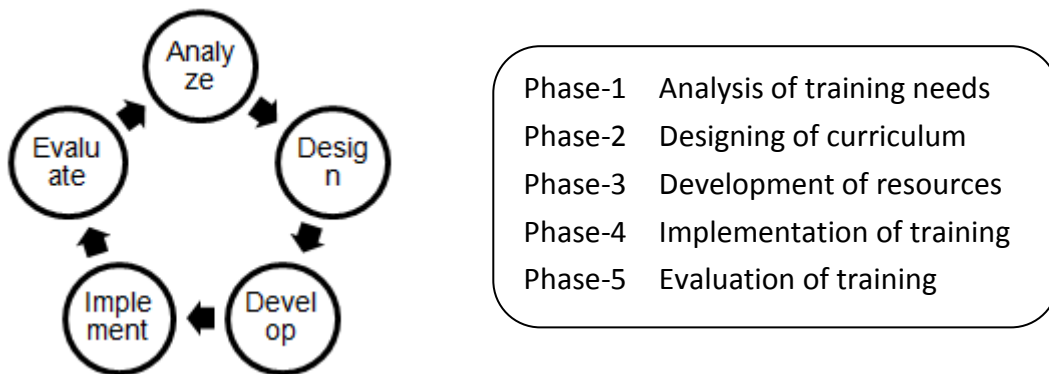
- 2.1 What is ADDIE Process Model?
- 2.2 What is the Benefit of ADDIE?
- 2.3 Phase-1: Training Needs Analysis (TNA) Phase
- 2.4 Phase-2: Training Design Phase
- 2.5 Phase-3: Training Resource Development Phase
- 2.6 Phase-4: Training Implementation Phase
- 2.7 Phase-5: Training Evaluation Phase
- 2.8 Summary

### 2.1 What is ADDIE Process Model?

ADDIE is the process model for systematic training management to ensure quality training courses. **ADDIE stands for 5 phases of 1) Analyze, 2) Design, 3) Develop, 4) Implement and 5) Evaluate** as shown in the chart below. In addition, it is important to provide feedback from one



phase to other phases so that every phase is effectively coordinated and integrated as one process of the training management.



## 2.2 What is the Benefit of ADDIE?

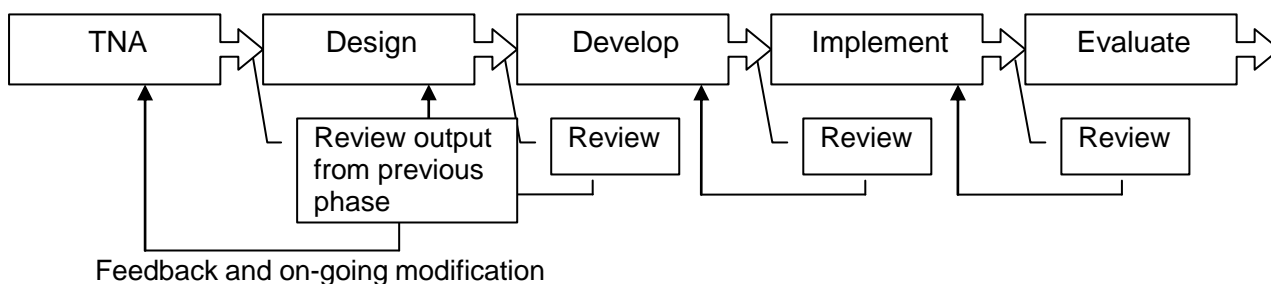
The PDCA cycle (Plan, Do, Check, Act) is often applied in many areas for improvement of work. It can be said that ADDIE is the training management version of PDCA. Similar to PDCA, there are three benefits in applying ADDIE process model to training management. They are

- **Quality assurance of training,**
- **Quality improvement of training, and**
- **Capacity development of training management staff.**

### Quality assurance through ADDIE

**ADDIE makes the training process proceed step by step by taking all necessary phases in an ideal manner.** ADDIE provides the check list on what is to be done for an effective training. Generally, the Needs Analysis step is often overlooked with a focus on the design stage as a first step, mainly because trainers assume they know the target groups quite well together with their needs. It is important to confirm with the target groups what the real areas of need are and which of these can be addressed through training.

In addition, **ADDIE provides the opportunity to make modifications in the training management when something goes wrong in the process.** This is because, when proceeding from one phase to the next phase, the output of the previous phase is reviewed. At every phase, the processes are to be checked and on-going modifications done as shown in the chart below.

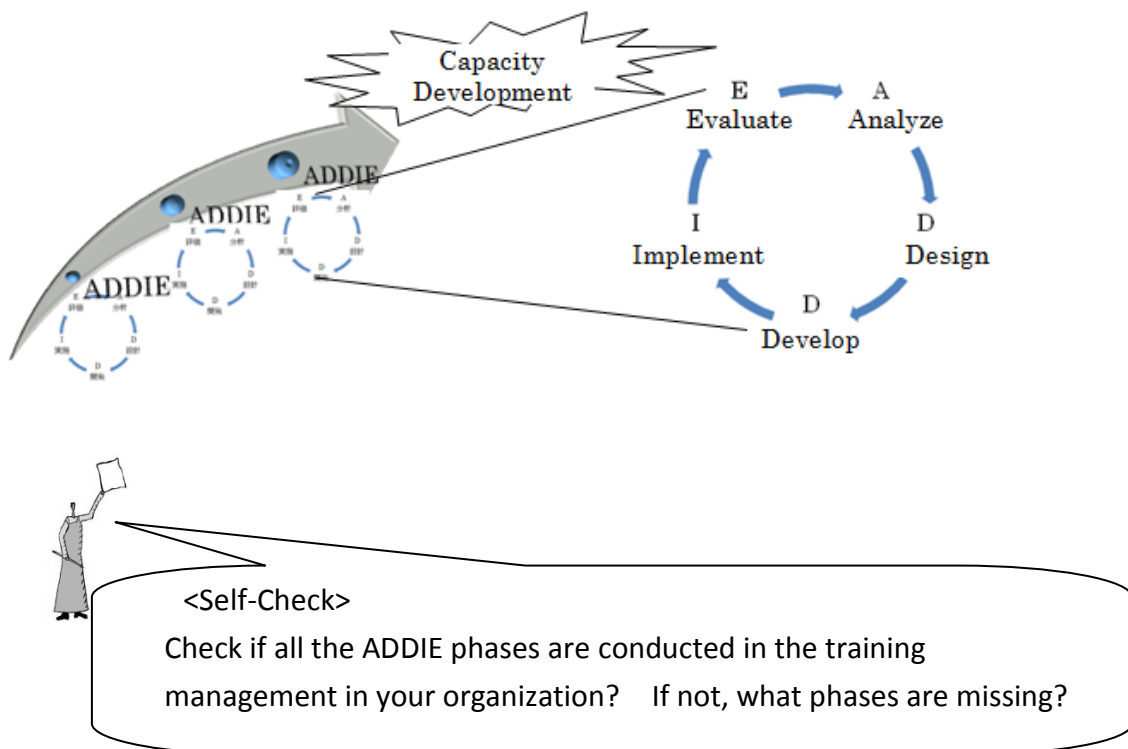


## Quality improvement by ADDIE

The ADDIE model requires an evaluation of the whole process at the last phase. At the end of each cycle of the ADDIE Process, the feedback generated through the experiences gained should be fed into the next cycle to make improvements. **By repeating this, the quality of the programme should improve every time through continuous improvement or Kaizen.**

## Capacity development by ADDIE

Applying the ADDIE model also contributes to capacity development of training managers and staff because they would need to prepare and conduct each phase by following step by step the standard procedures guided by the big picture of training management. Also the evaluation phase would provide suggestions on what should be improved regarding the capacity of people involved in training. Thus, **this approach develops technical skills in each phase and improves them continuously through the evaluation phase.**



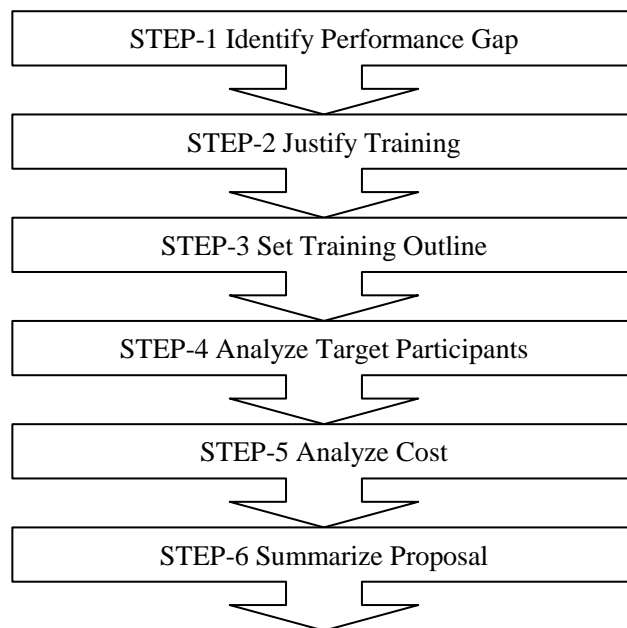
### 2.3 Phase-1: Training Needs Analysis (TNA) Phase

**The Training Needs Analysis (or Assessment) determines the direction and outline of the training** based on the needs in the target workplace. TNA has significant importance as the first phase of the training management of the ADDIE Process. **This TNA phase identifies performance gaps within an organisation, and determines what training programmes can contribute to addressing the identified gaps.** At the end of this phase, the direction for the various elements of training such as who, what, when, and where will be confirmed.

The key questions asked in TNA are;

- ✓ What are the performance gaps for optimum operation of an organisation in order to achieve its goals?
- ✓ Is training the best solution for the identified gaps?
- ✓ How can training support the organisation to achieve its goals effectively?
- ✓ Who are the target participants and their specific areas of training?
- ✓ What are the relevant training courses for the target organisation?
- ✓ What methods of trainings are appropriate for the target?
- ✓ Are training courses feasible in terms of cost and other resources?

The TNA is generally conducted by following the steps below.



Details of each step will be explained in subsequent modules.



<Example: Justification of training>

In the training needs analysis, an issue identified was that many staff members do not come on time to work. An Assessor was going to conclude that training on work ethics would be the solution to this problem. However, it was also found out that people cannot come on time because of chaotic public transportation systems. Rainy days are particularly worse. Thus the assessor finally concluded that the solution could be simultaneous implementation of work ethics training and arrangement of shuttle bus service for staff. The training objectives would have to be set based on this conclusion.

It should be noted that training cannot solve everything. Often training and systematic approach can together solve problems.

## 2.4 Phase-2: Training Design Phase

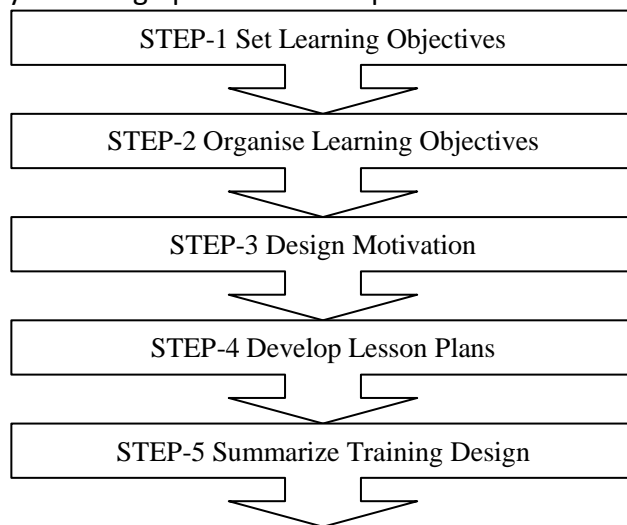
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Based on the programme outline formulated in the first phase of ADDIE, details of the training course will be designed in this phase. The design will impact on efficiency and effectiveness of the training process. The programme should be designed in such a way that objectives will be achieved most efficiently.

**The key questions asked in this phase are;**

- ✓ **What approach should be adopted to achieve efficiently the course objectives?**
- ✓ **What learning method is appropriate for the target participants?**
- ✓ **How to motivate participants to keep on learning?**

Generally the design phase has 5 steps below.



The details of each step will be explained in subsequent modules.

## 2.5 Phase-3: Training Resource Development Phase

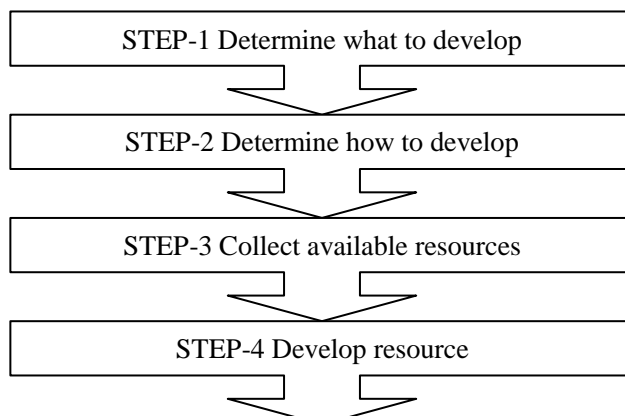
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Based on the programme design formulated in the prior phase of the ADDIE process, the learning resources needed for the training course is developed in this phase. The quality of the resources will impact on the efficiency and effectiveness of the training.

**The key questions asked in this phase are;**

- ✓ **What resources should be developed and what are their roles?**
- ✓ **How should the resources be developed?**

Generally, the training resource development phase has 4 steps below.



The determination of what to develop is critical. In order to deliver designed programme, several materials would need to be developed. Learning resources can be categorized into 5 as listed below.

- Learner’s guide (Learner’s manual, Textbook)
- Learner’s Workbook
- Supporting resources
- Presentation resources
- Facilitator’s guide

It is not necessary to develop all 5 kinds of resources for every training course. The resources to be developed are based on the course objectives, course structure, target participants, time duration, cost, etc.

Details of each step will be explained in subsequent modules.

## 2.6 Phase-4: Training Implementation Phase

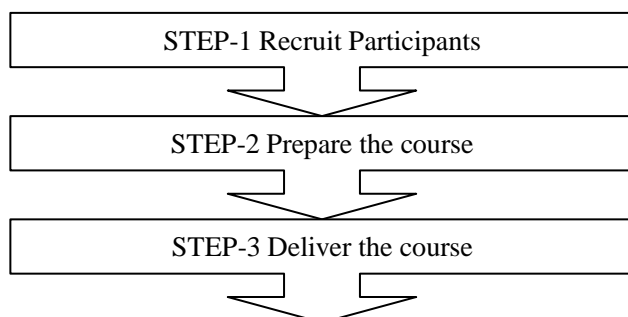
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This phase focuses on delivery of the programme. Utilizing all the resources developed, the course is delivered in accordance with the programme design. Course coordinators play a critical role in administration and facilitators play a critical role in session delivery.

**The key questions asked in this phase are;**

- ✓ **How should sessions be facilitated to achieve objectives?**
- ✓ **How should the course be coordinated to achieve objectives?**

Generally, the implementation phase has 3 steps below.



Details of each step will be explained in subsequent modules.

## 2.7 Phase-5: Training Evaluation Phase

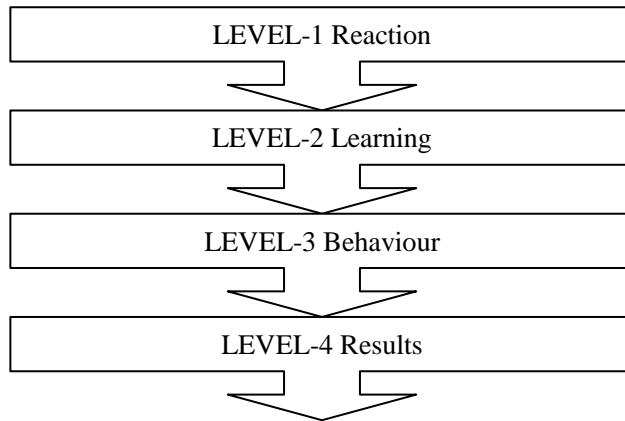
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After implementing training, an evaluation would have to be conducted. The evaluation phase is a critical point in the sense that results of the training should be reviewed and suggestions summarized for future implementation. **The main focus of evaluation is the Implementation phase. However, the previous phases to implementation such as TNA, Design, and Development phases should be taken into account.** In other words, the full ADDIE process should also be reviewed to provide support information in subsequent training courses.

The key questions asked in this phase are;

- ✓ To what extent has the course objectives been achieved?
- ✓ To what extent has the problem identified been solved by the training?
- ✓ What should be improved in subsequent training courses?

There are four levels of evaluation of training as below.<sup>1</sup>



Level-1 and 2 can be evaluated right after the training course in classroom, while Level-3 and 4 can be evaluated in participants' work places over a period of time. Thus these levels can be interpreted as steps in chronological order.

## 2.8 Summary

In this module, the ADDIE Process Model has been briefly introduced. ADDIE is the process model for training management and enables one to manage training courses in a systematic approach for quality training. ADDIE comprises of 5 phases; Training Needs Analysis, Training Design, Training Resources Development, Training Implementation, and Training Evaluation. ADDIE contributes to quality assurance and quality improvement of training and capacity development of training staff.



### <Self-Check>

Assess your organization how training programmes are managed.

- ✓ Training needs analysis is conducted prior to designing.
- ✓ Objectives of training are clearly set.
- ✓ Appropriate learning resources are developed for training.
- ✓ Training is delivered following the design and making the most of learning resources.
- ✓ The result of evaluation is utilized for improvement of subsequent training programmes.

<sup>1</sup> It is known as the Donald L Kirkpatrick's four levels of evaluation.



“Let’s apply ADDIE Process Model to your training management”

**Step-1: Analyze current situation**

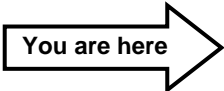
Let’s categorize your current training activities into 5 phases of ADDIE process by using the table below.

Phase	Activities conducted for your training
1. TNA	
2. Design	
3. Development	
4. Implementation	
5. Evaluation	

**Step-2: Identify what is missing**

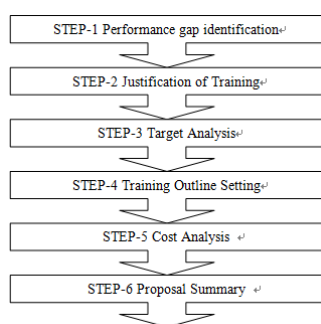
Based on above analysis, identify the gaps in your training activities.

## Module-3 Phase-1: Training Needs Analysis

	Module-1	Human Resource Development (HRD) Framework
	Module-2	ADDIE Process Model
	<b>Module-3</b>	<b>Phase-1: Training Needs Analysis (TNA)</b>
	Module-4	Instructional Design Basics
	Module-5	Phase-2: Training Programme Design –Curriculum Design
	Module-6	Phase-2: Training Programme Design –Lesson Plan Development
	Module-7	Phase-3: Training Resource Development
	Module-8	Phase-4: Training Implementation –Training Delivery
	Module-9	Phase-4 Training Implementation –Classroom Facilitation
	Module-10	Phase-5: Training Evaluation

### Learning Point of This Module

As you have learned in module-2, the TNA is generally conducted by following the 6 steps as below:



In this module, you will learn each step in details and also learn how to develop necessary tools for efficient and effective conduction of TNA. It should be noted that these guideline steps are not to follow every time. It should be flexible depending on a situation you are involved. You will also learn how to develop tools for TNA such as questionnaire and interview sheet.

At the end of this module, **you will be able to**

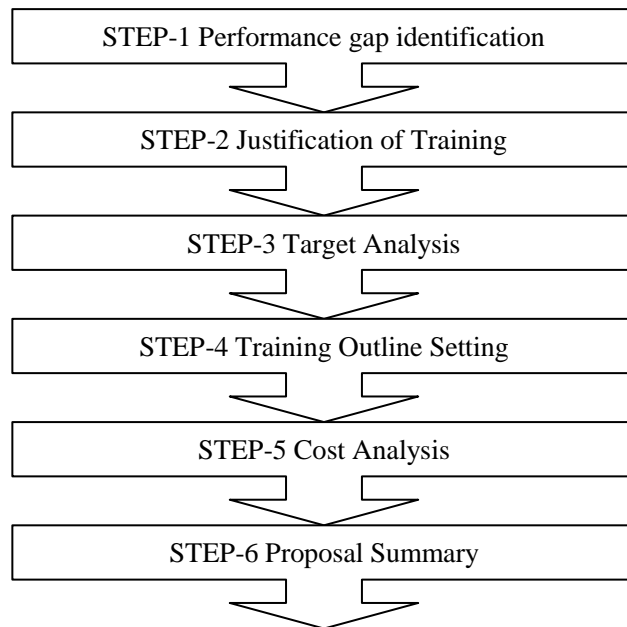
- **Explain what is involved in the TNA Phase**
- **Explain how to proceed with each step of the TNA Phase**
- **Plan whole process of TNA Phase by applying ID approach**

List of contents of this module:

- 3.1 Step-1: Performance Gap Identification
- 3.2 Step-2: Justification of Training
- 3.3 Step-3: Target Analysis



- 3.4 Step-4: Training Outline Setting
- 3.5 Step-5: Cost Analysis
- 3.6 Step-6: Proposal Summary
- 3.7 TNA Methods
- 3.8 Summary



### 3.1 Step-1: Performance Gap Identification

**Training needs are hidden in the gaps between ideal performance and reality. Performance gaps in an organisation can be identified by the three levels of analysis, namely (1) organisational analysis, (2) job analysis and (3) individual analysis.** It is also necessary to analyze the causes of the gaps. It is recommended to proceed from organisational level analysis down to individual level.

#### (1) Organisational Analysis

Organisational analysis looks at effectiveness at the organisational level. In this analysis, **visions, goals and objectives of the organisation are identified first as the ideal expected performance level. Then the actual situation against the ideal performance is analyzed as gaps and causes of the gaps are subsequently identified.** It is recommended to take the external and internal environments into consideration as factors impacting on the organisation. This analysis can also indicate where the problematic areas in the organisation are. Subsequently, the analysis can be focused on these identified areas.

- External environmental impact on the organisation includes;
  - ✓ Economic situation
  - ✓ Changing technology

- ✓ Labour market
- ✓ New laws
- ✓ Political trends
- ✓ Socio-cultural trends such as sexual harassment and workplace violence.
- ✓ Globalization
- Internal environmental impacts on the organisation includes;
  - ✓ Effectiveness of the organisation in meeting its goals
  - ✓ Available resources (money, human capital, facilities, materials)
  - ✓ Communication and decision making system
  - ✓ Financial management system
  - ✓ Human resource management system
  - ✓ Support for training (top management support, employee willingness to participate, etc.).

**Key questions to be asked for this analysis are as follows:**

- **What are the visions, goals, roles and functions of the organisation?**
- **What are the performance gaps at the organisational level?**



<Example: Background survey of TNA>

When conducting performance gap identification, it is recommended to start from the organizational analysis in order to identify issues in the organization level and determine the focus areas. In the JICA-CSTC Project, the Background Survey was conducted prior to the TNA in order to understand the general situation of the Civil Service in the target countries. This survey was viewed as the organizational analysis and found out some critical problem areas that the TNA can focus on.

## (2) Job Analysis

In the job analysis, data is gathered on jobs or groups of jobs. In this analysis, **the knowledge, skills, attitudes and competencies needed to achieve optimum performance to fulfill the jobs are identified.** This analysis can be conducted by targeting specific jobs or groups of jobs if organisational analysis had identified focus areas to be analyzed.

Data can be gathered from the documents and methods below:

- Job description
- Literature about the job
- Performance standards
- KSA analysis (i.e. analyzing required capability using three viewpoints- Knowledge, Skill, Attitude)

- Observation of the job/ Work samples (Observing products and services produced)
- Job inventory questionnaire
- Asking questions about the job
- Analysis of operating problems

Key questions to be asked for this analysis are as follows:

- What are the necessary abilities and competencies for fulfilling the job?

### (3) Individual Analysis

In the individual analysis, **the current level of knowledge, skill, attitude and competencies of organisational members is analyzed, and the performance gaps against expected levels, which can be identified by job analysis and causes of the gaps, are subsequently identified.** It is also effective to ask their personal specific training needs. This analysis can be conducted by targeting specific members if organisational analysis had identified focus areas to be analyzed.

Data can be gathered from the documents and methods below:

- Performance evaluation (Evaluating strengths and weaknesses)
- Performance problems' analysis (Analyzing the problems that occur)
- Observation of workplace (Observing both behaviour and results of that behaviour)
- Checking what training is needed /by managers, supervisors and individuals
- Attitude surveys (Measuring morale, motivation, satisfaction)
- Work samples (Observing products and services produced)
- Individuals training experience

**Key questions to be asked for this analysis are as follows:**

- **What are the current competencies and abilities possessed by the members?**
- **What performance gaps exist at the individual level?**

### (4) Integration of Three Levels of Analysis

After the three levels of analysis, **all the analyses are integrated and the performance gaps and causes are identified.** In addition to the above, the review of current training methods provides important information.

**Key questions to be asked for this analysis are as follows:**

- **What performance gaps are critical for the sake of achieving organisational goals?**
- **What are the reasons behind these performance gaps?**
- **Why are members not able to perform as expected?**
- **Is the expected performance level of the organisation clear to the members?**



<Example: Flexible steps of TNA>

To identify general training needs for the Civil Service as a whole, it is recommended to follow all the process mentioned in this manual from the organizational analysis down to the individual analysis. Then you can identify the needs across the Civil Service and prioritize them.

However, when thematic area (e.g. customer care), is predetermined by some reasons, the approach can be different. You should focus on identifying performance gaps in the area (e.g. customer care) from the beginning.

### 3.2 Step-2: Justification of Training

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The next step is to analyze how to solve the gaps. **This step justifies (or finds out if) whether the training can fill the identified gaps and determines where training is needed and under what conditions it will be conducted effectively.** It is important to analyze which of the gaps can be fulfilled by training. **Often gaps can be better solved by other means.** Training is not always the most effective way to solve a problem. Hence the analysis to determine whether training is the best way is needed.

It should be noted that the current training scheme and programmes in the organisation should be taken into consideration. The suggested training should be situated within this overall framework to contribute to the medium to long term strategy of the organisation.

**Key questions to be asked for this step are as follows:**

- **What effective measures have been taken to solve the performance gaps?**
- **Can this gap be solved by training or other means?**
- **What are the specific training areas and how can training contribute towards bridging the performance gaps?**
- **What are the expected outcomes of the training?**
- **Under what circumstances will the training be most effective?**



#### <Example: Solution for Lateness>

In the JICA-CSTC Project, one of the identified performance gaps was “Lateness”, that was many of civil servants often come to the office late. In the analysis of this problem, it was identified that the causes of this problem were (1) poor public transportation infrastructure and (2) inappropriate work ethics and less motivation. It was concluded that the training can address the second problem, but there should be other administrative arrangements to solve the first problem. These could include arranging staff buses by the office or the introduction of flexible working times. As shown in this case, the gap cannot be solved solely through training. It is important to confirm the areas that training could address.

### 3.3 Step-3: Target Analysis

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This step identifies the teaching methods by analyzing the target participants. There are two factors to analyze:

- **Current level of the target participants**
- **Learning style that is appropriate for the target participants**

**The current level of the target participants is analyzed in knowledge, skill, and attitude** in order to identify prerequisites of the training. Then the working modality, learning habit etc. of the target participants are analyzed in order to identify their favourite ways of learning and learning conditions such as how much time they can spend, when is the best time to learn, etc.

### 3.4 Step-4: Training Outline Setting

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This step makes outline of the training clearer by describing the ideal situation of the respective members’ performance, which is the target behaviours. These target behaviours should be determined in such a way that they can be measured by assessment. If the result is not measurable, you cannot tell if the target is achieved.

It is recommended to describe outline of the training through the points below.

- Title of the training course
- Target participants
- Training objective
- Target behaviours
- System of implementation

Training objective includes what is expected to be achieved, what problems are to be solved, and the level participants need to achieve. The target behaviours are broken down of the training objective and described in small tasks or elements. You can describe target behaviours as “Enable participants to xxxxxxxxxxxx”. System of implementation describes how proposed training will be

implemented. This involves timing of implementation, recruitment of participants, relationships with existing HRM system and other training courses.

**Key questions to be asked for this step are as follows:**

- **What knowledge, skills and attitudes are expected to be acquired after the training?**
- **What level of performance is expected after the training?**
- **How is the training organised?**



Appendix 3-1: Training Outline Setting Forms

### 3.5 Step-5: Cost Analysis

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This step makes clear the cost necessary to develop, implement, and evaluate the training. There are four points below to consider.

- **Cost for designing of curriculum**
- **Cost for development of materials**
- **Cost for operation (implementation)**
- **Cost for evaluation**
- **Cost for the participants**

First, the cost for development of the training, such as curriculum designing and learning resources development, is analyzed. The cost of the subject matter experts needs to be considered here. Cost for operation involves operational costs, which includes cost of logistics, printing of material, etc. The cost for evaluating the course should not be overlooked. Finally, the cost for the participants, in the form of money, time, and work, will be analyzed.

**With all these calculations, feasibility for the training will be determined.** When it is obvious that training is not feasible in a given condition, it is recommendable to go back to the previous steps and review the training outline to make it feasible.

### 3.6 Step-6: Proposal Summary

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All the data gathered and analyzed is to be summarized into a training proposal. The training proposal should include the content below:

1. **Analysis of performance gaps** and current issues in the organisation
2. **Justification of training** (how to solve the gaps by training, which areas are to be addressed by training)
3. **Outline of the proposed training**
4. **Suggestions and issues** to be considered for design and development of the proposed training course



Appendix 3-2: Sample Training Proposal

### 3.7 TNA Methods

#### Methods of Data Gathering

For data gathering, prepare a table to identify what information will be obtained from whom and how. The steps for making table are indicated as below.

**Step-1: Break down categories of necessary data** --- List data to be gathered in two categories of external environment and internal environment such as Economic situation, Political situation, and so forth.

**Step-2: Identify what data can be gathered, how and where?** --- Examine how and where each data can be obtained and summarize it into a table.

Based on the table, you will determine the method of data gathering such as interview, questionnaire, and etc. There are two kinds of data namely quantitative data and qualitative data. Quantitative data is easy to be measured, quantified and related to outputs, costs and time. Qualitative data is difficult to be measured and quantified but allows for feelings and attitudes to be included. Qualitative data is usually gathered from open ended questions and should be quoted as it is, or grouped together into similar responses. **Quantitative and qualitative data should be balanced.**

The table below table shows advantages and disadvantages of using interviews, questions and observations.

Method	Advantages	Disadvantages
Interviews (one –on- one)	<ul style="list-style-type: none"> <li>➤ Opportunity to provide opinions</li> <li>➤ Can monitor verbal and non-verbal responses</li> </ul>	<ul style="list-style-type: none"> <li>➤ Time consuming</li> <li>➤ Interviewer may influence responses</li> </ul>
Interviews (focus group)	<ul style="list-style-type: none"> <li>➤ Can provide deep insights by synergetic effect of the group.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Some interviewees can lead the interview in an un-effective way</li> <li>➤ Facilitation skill of interviewer may influence the responses</li> </ul>
Questionnaires	<ul style="list-style-type: none"> <li>➤ Save time, economical to administer</li> <li>➤ Can cover a large number of participants</li> </ul>	<ul style="list-style-type: none"> <li>➤ Difficult to prepare</li> <li>➤ No. of questions is limited</li> </ul>
Observation	<ul style="list-style-type: none"> <li>➤ Easy to see a skill being performed competently</li> <li>➤ Non-verbal language can provide valuable information</li> </ul>	<ul style="list-style-type: none"> <li>➤ Only surface information</li> <li>➤ Is open to misinterpretation</li> </ul>

In addition to above mentioned methods, Tests, Group Problem analysis, Records and Report Studies, Job analysis and Performance Reviews are appropriate for TNA data gathering.



<Example: Steps by step approach of survey>

Interview is effective for searching for general information, while questionnaire is effective when focus research area has been confirmed. In the JICA-CSTC Project, in order to gather various kinds of data and information related to any of the Civil Service activities in the target countries, the first Background Survey mainly employed semi-structured interview. Then, it was followed by the TNA Survey which mainly employed questionnaire. In the process of developing questionnaire, the result of the Background Survey was utilized.



Appendix 3-3: How to develop Data Collection Table

### Sampling Strategy

When it is not possible to cover all the members in target population in the survey, it is necessary to determine the samples. You must determine the samples in such a way that samples represent similar characteristics of target population of survey. Random sampling should be employed to pick samples without any biases. **Unintentional contingencies such as recruiting volunteers for interview survey by e-mail can result in picking those who have higher computer literacy, etc. should be avoided.**

### Interviews

Michalak and Yager (1979) assert that in order to use the interview technique most effectively, **the interviewer must plan the interview.** The authors suggest beginning with the end in mind. Ask yourself **“At the end of the interview, what information will I need so that I can conduct an effective training course?”**

Some examples of the problem

- The exact nature in the problem
- The areas affected in the organisation
- The number of people involved
- What is level of the performance deficiency
- What the employees are not doing that they should be doing
- What the employees are doing that they should not be doing

### Conducting Interview

- **Physical Setting:** The physical setting or the environment in which the interview is conducted is as important as the interview itself. The environment should be conducive



to have a conversation. Ideally, the physical setting is free of distractions, the noise level is minimum, and lighting is adequate. A neutral environment like a meeting room is preferred.

- **The interview Questions:** These are prepared beforehand. Use a semi-structured format that is have some questions ready, but be prepared to probe further as and when issues emerged during the interviews.
- **Recording Data:** Taking down extensive notes. Pen and paper is preferred. Keying in directly into a personal computer is convenient but it distracts both the interviewer and the interviewee. Furthermore, the personal computer acts as a barrier too. Another alternative to recording data is to have it taped recorded. There are some advantages and disadvantages to this method. The main advantage is all that was said was recorded and can be transcribed. The main disadvantage is that some interviewees may be intimidated and less candid when they know that they are being recorded. This can be overcome by informing the interviewee that no one else will hear the tapes.
- **Establishing Rapport:** Establishing rapport with the interviewee is important to enable the interviewee to feel relaxed and engaged in the conversation. Otherwise, the interviewee may feel that he or she is under interrogation.
- **Resource Consuming:** Interviews consume a lot of resources in terms of time and energy on both the interviewer and interviewee's part. The interview may not be feasible or practical if there are a lot of participants involved in the training course.

### Questionnaires

**Questionnaires are used when the number of people from whom information is required is too large** and unwieldy for the interview method. Some advantages of using questionnaires for a training needs analysis are:

- Questionnaires can reach many people in a short period of time, and at relatively low cost.
- They can take different forms, from paper-based to electronic versions.
- They give people a chance to express themselves without fear of embarrassment.
- The data can be easily summarized and reported.



Appendix 3-4: How to develop questionnaire

### Tests

Tests are valuable in helping to determine training needs. The usual tests used are those designed to measure performance of one kind or another. Achievement levels of individuals and

groups can be identified through testing. Entry-level skills can be easily measured. After a person has been on the job for some time, periodic appraisal may show a real need for cognitive, affective, and even psycho-motor updating. Commercial pilots are a good example. They have to take their qualifying tests regularly.

**Some advantages of using tests are that as a diagnostic tool, they help identify specific areas of deficiency, and they are relatively easy and quick to administer.** Some disadvantages of using tests are, they are limited to specific situations and skills and may not be transferable to other situations. The rule of thumb when it comes to using tests is to be certain you know what the tests measure, and what are its limitations.

### Group Problem analysis

Group problem analysis is similar to focus group meetings. **The advantages of a group problem analysis are it allows synthesis of several points of views, offered by the group members,** it often promotes general understanding and agreement, and it can build support for needed training. In itself, a group problem analysis can serve as a form of training.

The disadvantages of a group problem analysis are it is time consuming, and the participants may be too busy to participate.

Group problem analysis can be used to supplement the questionnaire method by verifying the findings of the questionnaire with the participants.

### Records and Report Studies

Records and report studies are secondary sources of data that already exists in the organisation. These can be used to supplement the findings of the questionnaire. Productivity, sales and operating ratios are some of the items that may be compared to pinpoint an individual need.

**Records and report studies are historical in nature, and may not reflect the current situation.** They should be only used as checks and clues in combination with other methods of needs assessment.

### Job analysis and Performance Reviews

Generally, **job analysis develops precise information about an actual job;** on-the-job performance is covered in the performance reviews. Jobs can be broken down into manageable segments for the purposes of both training and appraisal.

The challenge of this method is that these techniques are time consuming and difficult for people who are not trained in job analysis techniques. Many supervisors dislike reviewing their employees' inadequacies with them personally, and the individual training needs that surface are sometimes difficult to translate into organisational needs.

## Methods of Data Analysis

**Quantitative data is effectively analyzed by generating charts and graphs. Qualitative data helps analyze quantitative data and should be quoted as it is, or grouped together into similar responses.** Care must be taken not to interpret the response without empirical foundation. You should allow readers of the report to have the opportunity to draw their own conclusions.

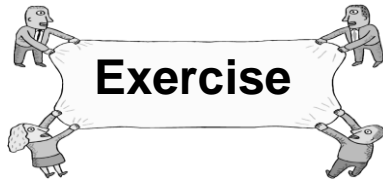


### Appendix 3-5: How to Organise Quantitative Data

## 3.8 Summary

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The TNA phase starts with identifying performance gaps by organisational analysis, job analysis, and individual analysis. Data can be gathered by interview, questionnaire, test, group problem analysis, records and reports studies, job analysis and performance reviews, etc. Then justify training for the solution of the gaps identified. Since training cannot solve every problems, it is important to make clear that what aspect training can contribute to solve the problem. Target participants should be analyzed, as well as cost and training outline should be set. Finally, all the findings should be summarized as training proposal. Preparation of data collection table would make data gathering efficient.



**“Let’s Plan Training Needs Analysis for your organisation”**

**STEP-1:**

Let’s identify current situation based on your knowledge for each gap level indicated in below table, and identify what can be solved by training.

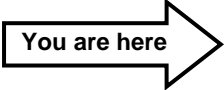
Gap Level	Current Situation by your perception (Gaps between ideal and actual)	What can be solved by training
1. Performance gap in your organisation		
2. Performance gap in your department		
3. Performance gap in your staff		

**STEP-2:**

Let’s plan TNA activities for validate above summarized idea.

Identified Gaps	Level	Information to be gathered	Target and method To gather information
1.	[ ]Organisation [ ]Department [ ]Staff		
2.	[ ]Organisation [ ]Department [ ]Staff		
3.	[ ]Organisation [ ]Department [ ]Staff		
4.	[ ]Organisation [ ]Department [ ]Staff		
5.	[ ]Organisation [ ]Department [ ]Staff		

## Module-4 Instructional Design Basics

	Module-1	Human Resource Development (HRD) Framework
	Module-2	ADDIE Process Model
	Module-3	Phase-1: Training Needs Analysis (TNA)
 You are here	<b>Module-4</b>	<b>Instructional Design Basics</b>
	Module-5	Phase-2: Training Programme Design –Curriculum Design
	Module-6	Phase-2: Training Programme Design –Lesson Plan Development
	Module-7	Phase-3: Training Resource Development
	Module-8	Phase-4: Training Implementation –Training Delivery
	Module-9	Phase-4 Training Implementation –Classroom Facilitation
	Module-10	Phase-5: Training Evaluation

### Learning Point of This Module

The purpose of any training programme is to deliver the result. Instructional Design (ID) provides you a map of how to reach this goal. ID is a systematic and learner-centred approach of effective and efficient teaching and learning to guide developing effective programme and implementing it by leading participants to a desired goal.

ID provides various models for effective learning and teaching. You will learn some of the well-known models such as Andragogy, Experiential Learning Model, PIE Rule, and ARCS Model, etc. and think of how to apply these models to your sessions.

Combination of effective learning approach mentioned above and systematic design approach that is ADDIE Process Model would make the best training programme.

At the end of this module, **you will be able to**

- **Explain Andragogy, Experiential Learning Model, PIE Rule, and ARCS model**
- **Apply such ID models to training design and delivery**
- **Explain some tips for effective training delivery**

List of contents of this module:

- 4.1 Andragogy
- 4.2 Experiential Learning Model
- 4.3 PIE Rule
- 4.4 ARCS Model
- 4.5 Other Tips

## 4.6 Summary

### 4.1 Andragogy

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Our participants are the civil servants who are dealing with public services of the country. They are not students at school. They are adults and have their own job targets and responsibilities. They participate in the training course in order to develop their capacities and their sponsors expect improvement in their service quality as a result of the training. **We do not teach and control them in one way but we help them learn, develop their capacities, and solve their problems themselves.** Our approach should not be the same as school teachers. The Andragogy provides us a lot of advice on our training activities within this context.

The term “Andragogy” was first introduced by Alexander Kapp in 1833 as learning strategies focused on adults. In his book titled, “The Modern Practice of Adult Education: From Pedagogy to Andragogy”, it is stated that **Andragogy is the art and science of helping adult learning**, while Pedagogy describes how to teach at schools. Its application has been developed by Malcolm Knowles, USA as the P-MARGE model. **P-MARGE describes the difference between teaching adults who are learning for practical output in their workplaces and teaching students at schools.**

P: Learners are **P**ractical  
M: Learner needs **M**otivation  
A: Learners are **A**utonomous  
R: Learner needs **R**elevancy  
G: Learners are **G**oal-oriented  
E: Learner has life **E**xperience

**P:** Adult learners are business oriented. When he/she confirms the benefit to learn, he/she starts to learn. For example, when an adult feels the need to learn in order to solve his/her problem, he/she starts to learn.

**M:** When teaching adults, facilitators should consider all these factors as motivation for learners.

**A:** Adult learners want to manage themselves. They prefer to learn in their own style and time lines. Hence, support should be provided in such a way to support this style.

**R:** Adult learners start learning from something related to their life or current concern.

**G:** Adults learn to achieve goals or to solve problems. Hence, the curriculum should include many problem solving subjects.

**E:** Adult has his own experience in his life. Such past experiences should be considered.

In our training course, this Andragogy concept should be well considered to make training more effective.



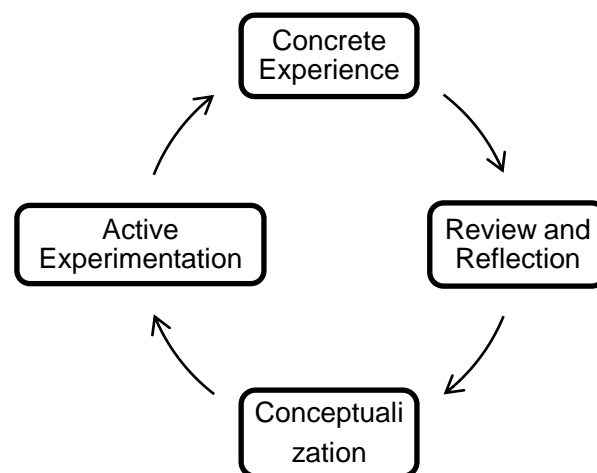
<Example: Application of “Practical” to session delivery>

Let’s think about how to apply “P: Adult learners are business oriented” in your session. When you deliver a session on effective delegation, for example, you should clearly confirm in the beginning how this session will contribute toward increasing participants’ jobs. You cannot take for granted that all the participants are aware of the importance of effective delegation. Some participants may misunderstand that delegation is not necessary for delivering a quality job. You have to start from explaining how delegation is important for improving the quality of the Civil Service, or how the quality of outputs can be inefficient because of lack of delegation, etc.

## 4.2 Experiential Learning Model

### Concept of the Experiential Learning Model

In addition to the Andragogy explained in the above, **Experiential Learning Model is effective to apply when we target practitioners like Civil Servants.** As 70/20/10 Model<sup>2</sup> indicates that 70% of capacity development comes from on-the-job experiences, while 20% from observations of others and advice from others, and 10% from reading and training, **this model shows how learning can be effectively achieved through experience by focusing on the important role of experience plays in the learning process.**



As it is shown in the chart above, learners first have concrete experience,

then taking time to review or reflect, conceptualize it to obtain lessons learned, and finally experiment by applying lessons learned to a new activity. This model is the work of David A. Kolb.

The process of implementing training following this model is briefly explained below.

**Concrete Experience:** Make people have concrete experience. The learner must be willing to

<sup>2</sup> Learning and Development model based on research by Michael M. Lombardo and Robert W. Eichinger for the Centre for Creative Leadership.

be actively involved in the experience. If it is done in actual workplace, experience should be clipped out as a certain amount of package size of frame. If it is done in classroom, experience can be given as simulation in the form of case study, role play, and etc. but it should be practical and realistic.

**Review and Reflection:** After having experience, facilitate learners to review it and reflect on it. This process is the most important to make the experience learning opportunity. The learner would objectively and calmly review that he/she did, process, result, and influences to the others.

**Conceptualization:** Facilitate conceptualize and generalize what they learned from the experience. In this process, learner would pick up key success factors, guideline steps, working framework and summarize lessons learned.

**Active Experimentation:** Now learners would challenge new experience by applying what they learned in the previous experience. And repeat the cycle.

#### Application of the Experiential Learning Model

This model encourages to consider daily working as learning opportunity rather than providing training separately from working environment that is often called off the job training. Thus **on the job training can be designed based on this model.** However, it is possible to apply this model to off the job training in a classroom. But creating an experiential learning environment can be challenging for facilitators. You need to identify activities that allow learners to understand and absorb concepts. You also need to be creative to engage participants, get them up out of their chairs, involved in an experience. **Facilitate in such a way that participants totally immersed in the learning situation to gain new knowledge from their peers and the environment created.**

It should be noted that by providing direct experience in addition to standard written and visual materials, learners with different types of learning styles and strengths can be accommodated.

#### Facilitation for the Experiential Learning Model

**The facilitator must consciously avoid assuming responsibility for others.** Group members will often try to shift responsibility or blame to the facilitator or the situation. Yet the greatest potential for learning rests in group members becoming fully aware of their responsibility for their behaviour.

**Facilitators must also realise that there is a considerable skill involved in working with people and in conducting these structured experiences.** Explicit directions for conducting a particular experience by themselves do not guarantee even minimal success. Facilitators have to know much more about the model than simply its step-by-step instructions.

**In the experiential model, facilitators are much more vulnerable in terms of feeling and behaviour.** They are no more visible in this model, but since it provides a vehicle for them to receive feedback, they must be ready to confront action and feelings directed toward them. They



may be unaccustomed to dealing with these behaviours. Facilitators should remember that the use of the experiential model takes time. They should take care not to crowd the experience, leaving sufficient time for discussion and summarizing. Effectiveness depends on thorough planning.

If facilitators understand the basic components of the experiential model, **the most important skills they can bring to the situation are their ability to be sensitive to people**; to know where they are what they expect, fear, or anticipate; and to select the appropriate leadership style, experience, content presentation, and timing sequence to fit the diverse needs of the situation.



<Example: Application of Experiential Learning Model to course level>

During the classroom training, facilitate to review participants' work experience and conceptualize them every opportunity in relation to each topic instead of one way lecture. After the training, put the framework to implement what participants learned in the training to their workplace. Action plan is the best framework. These participants will be gathered again as the follow up session after action plan implementation for review & reflection and conceptualization that is to repeat the Experiential Learning cycle. This is a beautiful implementation of Experiential Learning Model to a training course.

<Example: Application of Experiential Learning Model to a classroom session>

You can apply this model by including activities such as case study, role play, hands on exercise, group work, etc. in a session. In case of ethics session, after explaining ethical principles and guidelines, you can give a short mini case study of ethical challenges and let them think about it individually. They would apply instructed knowledge and come up with a conclusion respectively. When each participant has come up the conclusion, facilitate to review and reflect how each participant came up with that conclusion. Further facilitate to conceptualize what happened in the process of decision and summarize so that participants would obtain lessons learned from his/her own experience of mini case study discussion. After this process, you can give another case study and let participants think about it by small groups as active experimentation process.

### 4.3 PIE Rule

Adults cannot be forced to sit and learn. Even though adults can sit and listen quietly in their chairs for 1hour or 2 hours, they cannot really learn and understand concepts to the level that they can apply what they learned. Facilitators must make sessions dynamic and touch the heart of

participants so that sessions will be more effective.

The PIE Rule is a simple tool to make presentations more effective. They are;

- **P**ractical
- **I**nteractive
- **E**njoyable

The above mentioned items can be used to assess your session. Ask yourself if today's session was practical, interactive, and enjoyable.

**Practical:** When facilitators talk about a topic, **they should refer to actual examples and make it practical so that participants will understand how to apply it in their own job contexts.** It is better to provide opportunity to apply what they learned.

**Interactive:** People tend to learn by interacting with other people. **Interactivity provides participants opportunities to speak up, summarize and reorganise their learning. Interactivity also contributes to maintaining gained knowledge for long periods.**

**Enjoyable:** A session is not necessarily always serious. **Relaxation is important to make participants active and open their hearts positively, contributing to a constructive atmosphere for learning.**



<Example: Enjoyable session is effective>

Seriousness is necessary in learning. However, enjoyments can co-exist with seriousness. People can learn a lot in a relaxing mode. You can include enjoyable icebreakers during sessions. You can replace a simple presentation with a game or exercise. It is suggested that any such activities should be related to the learning topics so that it can contribute to achieving the learning objectives. It is the one that Facilitators need to provide is enjoyable learning experiences.



<Self-Check>

Assess yourself on your session by using the PIE Rule.

- ✓ To what extent is my session practical?
- ✓ To what extent is my session interactive?
- ✓ To what extent is my session enjoyable?

## 4.4 ARCS Model

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ARCS model has been developed by John M. Keller, USA as a motivational design. "ARCS" stands for four (4) words. These are;

- **A**ttention
- **R**elevance
- **C**onfidence
- **S**atisfaction

This model can be applied to design course level and session level.

Attention (How to make the participants feel this training is interesting):

Attention can be gained from facilitators by Perceptual arousal and Inquiry arousal. **Perceptual arousal means gaining interest by surprise or uncertainty. Inquiry arousal means stimulating curiosity by posing challenging questions or problems to be solved.** Application of this model includes,

- Active participation --- Engage in games, role plays, hands-on exercise.
- Variability --- Apply variety of methods in presenting material such as videos, short lectures, and group discussions.
- Humor --- Use some humor to maintain interest of the participants and make them relax.
- Incongruity and Conflict --- Use contradictions, play "devil's advocate".
- Specific examples --- Give visual stimuli, story, or biography.
- Inquiry --- Pose questions or problems to solve.

Relevance (How to make the participants feel this training is useful):

**Establish relevance in order to increase a learner's motivation by speaking concrete language and examples with which the learners are familiar.** Six major strategies help you increase relevance;

- **Experience** – Tell the participants how the new learning will improve their existing skills. We best learn by building upon our present knowledge or skills.
- **Present Worth** – Explain clearly what the subject matter will do for the participants today.
- **Future Usefulness** – Explain clearly what the subject matter will do for the participants tomorrow.
- **Needs Matching** – Assess the participants whether they are learning because of achievement, risk taking, power, or affiliation.
- **Modeling** – Use modeling to show the participants how the desired outcome relates to them. Other strategies include guest speakers who completed the course in the past, videos, and having the learners who finish their work first to serve as tutors.

- **Choice** – Allow the participants to use different methods to pursue their work or allow choice in how they organise it.

Confidence (How to support the participants to be successful):

**Give the participants confidence that they can achieve the goal set.** Four major strategies help you increase confidence:

- **Provide objectives & prerequisites** --- Help the participants estimate the probability of success by presenting performance requirements and evaluation criteria. Ensure the participants are aware of performance requirements and evaluative criteria.
- **Increase levels of difficulty** --- Allow the participants small steps of growth during the learning process by increasing levels of difficulty step by step. Be careful not to make things too difficult. No one will want to continue. Small successes along with increasing levels of difficulty will build learner confidence and keep the learners engaged.
- **Provide feedback** --- Help the participants clearly understand what information they understand and where they may need additional learning.
- **Learner control** --- Make the participants understand that there is a direct correlation between the amount of effort made and the amount of skill and knowledge gained from that experience.

Satisfaction (How to make the participants satisfied and motivated to continue to learn):

**Satisfy the participants by providing some type of rewards such as a sense of achievement, or praise from others.** Three main strategies help you promote satisfaction:

- **Natural Consequences** --- Provide the participants with a realistic environment in which they will apply what they learned and the skills acquired. Methods include case studies, role-plays, simulations, and games.
- **Positive consequences** --- Provide the participants with rewards or feedback that will encourage them to continue to achieve the target. Positive comments, prizes, certificates, even cash can be an effective positive consequences. However, do not patronize the learner by over-rewarding easy tasks.
- **Equity** --- Maintain consistent standards and consequences for success.



<Example: Fostering learners' confidence by role playing>

Let's think about how to apply "Confidence" in your session.

You have to make your participants confident to perform what they learned in the session so that they will be able to apply it effectively in their workplaces. In other words, this is to increase readiness of participants to work.

For example, in teaching negotiation skills, you can introduce role plays. Participants will try to use what they just learned in a paired negotiation role play.

Instruction of role play could be as follows;

1. Form pairs and instruct pairs to decide who will play the role of negotiator first.
2. Instruct the pairs to select a negotiation topic and discuss the outline of the negotiation. Topic and outline should be realistic to negotiator's working environment.
3. Instruct negotiators not to use all techniques that they learned but suggest just one or two techniques in a role play. Instruct them to list up techniques to use in a role play. Provide objectives & prerequisites to make it easier for the pair.
4. Start a role play for 3 minutes
5. Instruct counterparts to give feedback to negotiators by sharing what they felt during the negotiation and what can be improved. Provide feedback: Participants will understand how effective or ineffective their techniques are and what should be improved.)
6. Change the roles and repeat the same instructions.
7. Repeat role plays by improving techniques based on the feedback. Learner control: Participants will feel that the training can improve their negotiation skill.
8. If there is second round, you can instruct list up other techniques or increase the number of techniques. (→ Increase levels of difficulty: Participants will develop their skill step by step.)

## 4.5 Other Tips

Six elements for miserable curriculum (Source: Yoshiko Terada, JICA-Net Seminar, 2011)

These elements of failure have been picked up. You can make your session more effective by avoiding the 6 elements below.

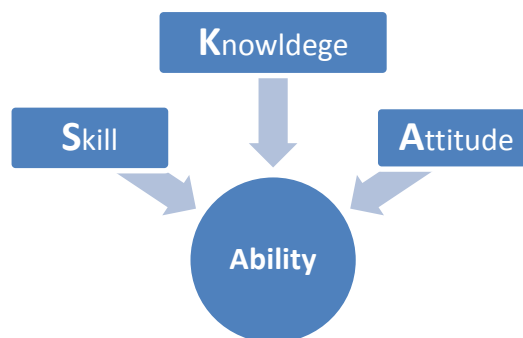
1. **Too much telling** --- One way communication by lecturing with a lot of information.
2. **Too much truth** --- There is no speculative element that stimulates participants and makes them think about their own context.
3. **No emotion** --- There is no emotional element included that impacts on participants' feelings

- 4. **No doing** --- Participants are not given opportunities to try what they have learned.
- 5. **No failure** --- There is no chance to make mistakes by trying what they have learned.
- 6. **No time** --- Enough time has not been allocated and so participants would be frustrated with activities that are rushed.

### Three domains for learning: KSA Model

Learning is divided into 3 categories below:

- **Knowledge (Cognitive Domain):** What participants will be able to understand? Facilitators will ask themselves what areas of knowledge they want participants to understand at the end of a session.
- **Skill (Psychomotor Domain):** What participants will be able to do? Facilitators will ask themselves what skills they want participants to actually exhibit at the end of a session.
- **Attitude (Affective Domain):** What participants will be able to feel? Facilitators will ask themselves what feelings they want participants to have at the end of a session.



It is important to design the programme or session with these three domains in mind. Your strategy towards ensuring that participants have acquired new knowledge, skills and attitude has to be clearly spelt out.



### <Example: Application of KSA in program design>

It is helpful to breakdown abilities into the 3 categories of KSA when you design any training program. Let's pick up "procurement" as an example. The ability of the procurement officer can be broken down as follows:

**Knowledge:** Officer must know about procurement law, internal standard processes, technical aspects of procuring products, etc.

**Skill:** Officer must have skills for checking quotations, information collection, and negotiation with companies, etc.

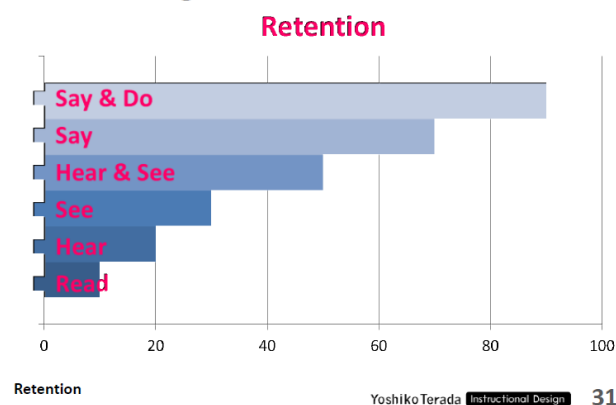
**Attitude:** Officer must be ethical, fair and committed to the benefit of the nation, etc.

After the above breakdown, design session to reflect how to provide knowledge, skill and attitude by using appropriate methodologies.

### Retention Strategy

Lectures or presentations do not mean that participants have understood the content. Confucius' interesting quote says "What I hear, I forget, what I see, I remember, but what I do, I understand." **In order to make participants retain new knowledge, facilitators should include activities to make participants see, say, and do new things.** The chart below shows the level of retention by each method.

### The Argument for Involvement



(Source: Yoshiko Terada, JICA-Net Seminar, 2011)

### 90/20/8 Rule

A physiological research indicates that average adults can listen with understanding for 90 minutes. However, they can listen with retention for 20 minutes. And they need to discuss and apply what they're learning every 8 minutes. Based on this research results, it is suggested that **one should not teach more than 90 minutes. The mode is changed at least every 20 minutes, and**

**one should try to find a way to involve participants every 8 minutes.** (Source: Robert W. Pike, Creative Training Techniques Handbook)



<Example: Making session effective by applying the 90/20/8 Rule >

The 90/20/8 rule is critical in developing a lesson plan.

The total duration of any session should be within 90 minutes. Every 20 minutes, you need to change the mode of the session by switching from the PowerPoint presentation to a case study, video, group exercise, etc. You can insert short physical exercises for refreshment. A simple example of session time line is shown below:

20 min. Introduction and Presentation 1

15 min. Case study

20 min. Presentation 2

20 min. Group Exercise and presentations

15 min. Presentation 3 and summary

(Total: 90 min.)

In each presentation, do not forget to involve participants at least every 8 minutes. You can pose questions to the class and invite comments and questions instead of delivering a one-way lecture.



<Self-Check>

Let's review your session's time line by referring to the 90/20/8 Rule.

- Do you involve participants every 8 minutes at least?
- Do you change your pace or mode of presentation in no more than 20 minutes?
- Is the length of the session no more than 90 minutes without break?

## 4.6 Summary

In this module, some well-known theories and models have been introduced. Each of them can provide facilitators with guidelines to make sessions effective.

Andragogy is the Instructional Design (ID) model for targeting working adults. This provides teaching guidelines such as "PMARGE" that are different from the teaching approach accepted in school education in terms of being Practical, Motivating, Autonomous, Relevant, Goal-oriented, and



sharing life experiences.

Experiential Learning Model is focusing on the concrete experience and reviews it for obtaining lessons learned and applies them. There are 4 elements of this model that are Concrete Experience, Review and Reflection, Conceptualization, and Active Experimentation.

PIE Rule is the simple check list to make session effective. They are Practical, Interesting/Interactive, and Enjoyable.

ARCS Model is the one of the representing one among Instructional Design models. This ARCS model suggests that sessions can be made effective by considering four points namely; Attention, Relevance, Confidence, and Satisfaction.

Other ID tips include the 6 elements for miserable curriculum, KSA Model, Retention strategy, and 90/20/8 Rule.

Facilitators should apply these models when they plan and deliver their sessions in order to improve them.

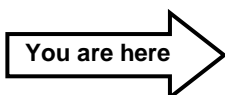


“Let’s apply PMARGE Model to your presentation”

Let’s think about a strategy for your presentation and facilitation by referring to the PMARGE Model. In the table below, fill out the strategy to improve the session by applying each element of PMARGE.

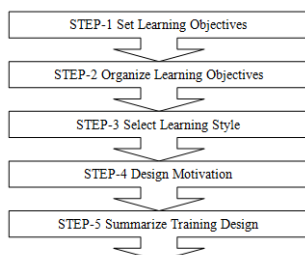
Element	How to improve
Learners are Practical	
Learners needs Motivation	
Learners are Autonomous	
Learners needs Relevancy	
Learners are Goal-oriented	
Learners have life Experiences	

Module-1	Human Resource Development (HRD) Framework
Module-2	ADDIE Process Model
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
<b>Module-5</b>	<b>Phase-2: Training Programme Design –Curriculum Design</b>
Module-6	Phase-2: Training Programme Design –Lesson Plan Development
Module-7	Phase-3: Training Resource Development
Module-8	Phase-4: Training Implementation –Training Delivery
Module-9	Phase-4 Training Implementation –Classroom Facilitation
Module-10	Phase-5: Training Evaluation



### Learning Point of This Module

As you have learned in module-1, The Training Designing is the detailed description or breaking down of the training proposal, which has been developed in the TNA Phase. It is generally conducted by following the 5 steps below:



In this module, you will learn about each step in detail and how to apply instructional design models to ensure a quality training design. You will also be provided templates to help design any training program.

At the end of this module, **you will be able to**

- **Explain what is involved in the Training Design Phase**
- **Explain how to proceed with each step of the Training Design Phase**
- **Plan whole process of Training Design Phase by applying ID approach**

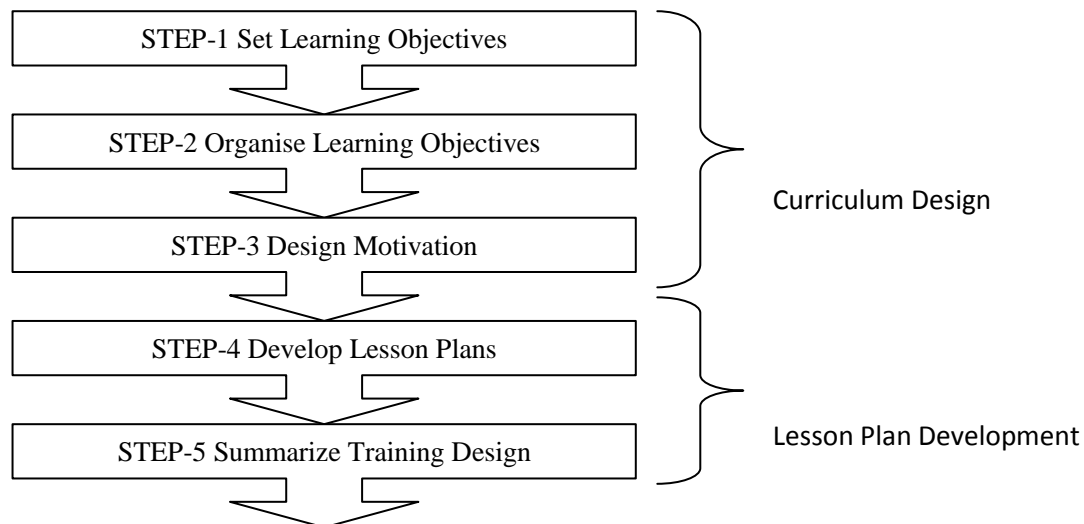
List of contents of this module:

- 5.1 What is Training Design
- 5.2 Step-1: Set Learning Objectives
- 5.3 Step-2: Organise Learning Objectives
- 5.4 Step-3: Design Motivation

## 5.5 Summary

### 5.1 What is Training Design?

The training course is designed based on the training proposal which has been developed in the prior phase of the Training Needs Analysis. **The results of the training needs analysis should be utilized for an effective programme.** In instances where there appears to be some missing information, it is recommended that the training needs analysis phase is revisited and more research for additional information carried out. This phase generally has 5 steps outlined below.



From Step-1 to Step-3 is explained in the module-4 “Phase-2: Training Programme Design –Curriculum Design”, and from Step-4 to Step-5 is explained in the Module-5 “Phase-2: Training Programme Design –Lesson Plan Development”.

### 5.2 Step-1: Set Learning Objectives

#### What are learning objectives

The overall goal of the training is what is to be achieved at the end of the training course. On the other hand, learning objectives of the course (Course Objectives) are the immediate outputs of the training. **Learning objectives describe participants’ state right after the training. This covers three areas of competency namely; Knowledge, Skill, and Attitude (KSA).** It describes what participants will be able to know/understand, do, and feel. Similarly, it is also called the three domains of learning objectives namely Cognitive domain, Affective domain, and Psychomotor domain. The cognitive domain is the knowledge that learners are to acquire, the affective domain describe the attitudes and feelings that learners are expected to develop, and the Psychomotor domain is the skills that learners are to master. Objectives often starts by a sentence such as “At the end of the course, participants will be able to”.

Here are some samples of learning objectives;

- At the end of the course, participants will be able to list three benefits of instructional design to the effectiveness of training

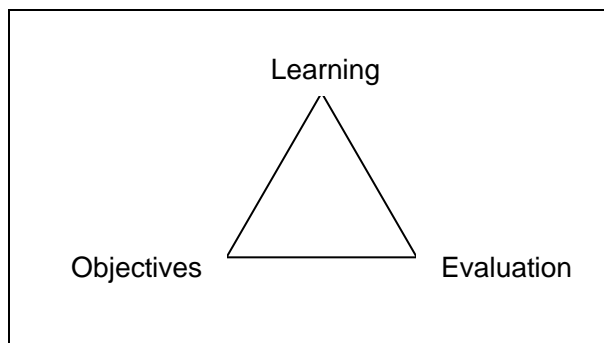
- At the end of the course, participants will be able to explain three models of instructional design.
- At the end of the course, participants will be able to develop lesson plans by following standard steps.

### Why set learning objectives?

It is important to have a destination in mind when planning to travel. In the same way, all the efforts in training design is aimed at achieving set objectives. It is therefore very important as a first step to clarify the learning objectives. **It should be noted that evaluation of training will be conducted against these learning objectives.** The purpose of the objectives are:

- To set the direction and to help participants on areas to focus on
- To guide facilitators to deliver the session in the set direction
- To provide guidance on how to evaluate the training

Objectives, Learning, and evaluation influence each other and should be coordinated like the chart below. It is called the “Magic Triangle”.



### Evaluation

Evaluation is the last phase in the ADDIE Process Model. However, when you set learning objectives, you must consider evaluation as mentioned in the Magic Triangle. **Evaluation is to examine if the set objectives have been achieved.** In order to make objectives measurable, the evaluation of the objectives should be cleared when you define objectives.

Evaluation is done at four levels<sup>3</sup> indicated below.

- **Level-1: Participants’ reactions**
- **Level-2: Participants’ learning**
- **Level-3: Participants’ behaviour**
- **Level-4: Results**

The overall goals of the course can be evaluated at Level-3 and 4, while learning objectives can be evaluated at Level-1 and 2. Ensure that learning objectives are formulated in such a way that

<sup>3</sup> Kirkpatrick’s Four Levels of Evaluation.

they would be clearly evaluated at the Evaluation Phase. Details of the four levels of evaluation will be explained in Module-9, Phase-5: Training Evaluation.

Three component of learning objectives

**An objective should have three key components: performance, condition and criteria.**

**Performance** --- A learning objective should describe behaviour that can be observed, that is, what the participant will be able to do as a result of the training. Sometimes it is difficult to observe the level of achievement especially when dealing with attitude or affective domain. **When the objective is not measurable by observable behaviour, specify the consequences of the learned behaviour that can be accepted as evidence of learning.** For example, for a cross-cultural training course, an objective might include “able to chose appropriate words in communicating with colleagues when facing cross-cultural challenges in the work place” or “able to list three cross-cultural issues in the work place”, instead of “able to increase awareness of cross-cultural issues in the work place”.

The learning objective should contain specific action verbs. The table below suggests some action words for each of the desired learning outcomes.

Attitude development	Skills development	Knowledge development
Adjust Analyze Assess Choose Criticize Decide	Assemble Compare Construct Copy Count Demonstrate Design Develop Process Prove solve	Cite Compare Contrast Define Describe Detect Differentiate Distinguish Explain Identify List Name Quote

**Condition** --- **The objective explains the circumstances under which the participant will be performing the activity.** It also describes the equipment, suppliers, and job aids that may or may not be used on the job. The objective also describes the work setting and any information used to direct the action.

For example, the statement such as “Using open-ended questions to identify customer needs, the participant will...” identifies the tools the participant will use to help him or her perform an action.

**Criteria** --- **The learning objective specifies the level or degree of proficiency that is necessary to perform the task or job successfully.** It indicates the quality of the performance required to achieve objectives. Thus, information in the criteria is used to evaluate performance. The objective

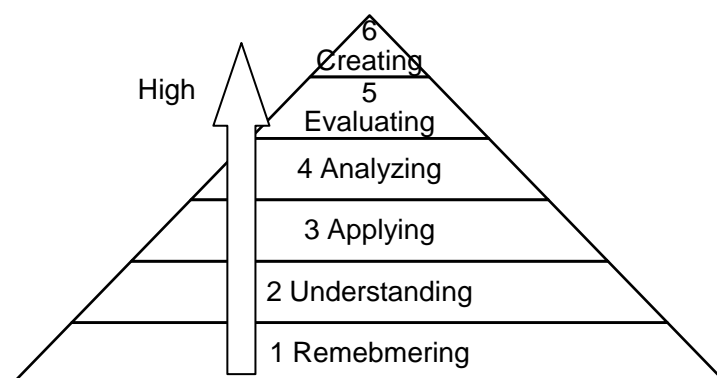
may involve speed, accuracy with a margin of error, maximum number of mistakes permitted, productivity level, or degree of excellence.

### 5.3 Step-2: Organise Learning Objectives

#### Blooms Taxonomy

Bloom's Taxonomy model was proposed in 1956 by Benjamin Bloom. He classified learning activities into three domains, namely Cognitive, Affective, and Psychomotor. This helps organise learning objectives. These are sometimes explained as Knowledge, Attitude and Skill. He broke down each domain into several levels. According to his classification, **the Cognitive Domain comprises of Knowledge, Comprehension, Application, Analysis, Synthesis, and Evaluation from the lower to higher level.** Affective domain comprises of Receiving, Responding, Valuing, Organising, and Characterizing. Psychomotor domain comprises of Perception, Set, Guided Response, Mechanism, Complex Overt Response, Adaptation, and Origination.

Based on the above classifications, six (6) simple levels of learning have been created. They are Remembering, Understanding, Applying, Analyzing, Evaluating, and Creating as shown in the chart below.



The table below summarizes the 6 levels of learning.

Level	Description	Example and Key Words
6 Creation	Builds a structure or pattern from diverse elements. Put parts together to form a whole, with emphasis on creating a new meaning or structure.	Examples: Able to design a training programme to improve organisational performance.  Key Words: categorizes, combines, compiles, composes, creates, designs, explains, generates, organises, plans, etc.
5 Evaluation	Make judgments about the value of ideas or materials.	Examples: Able to explain and justify a new training programme based on the training needs analysis.  Key Words: appraises, compares, concludes, contrasts, criticizes, describes, evaluates, justifies, summarizes, etc.
4 Analysis	Separates material or concepts into component parts so that its organisational structure may	Examples: Able to gather information from your organisation and identify priority organisational problems.

		be understood.	Key Words: analyzes, breaks down, compares, differentiates, identifies, etc.
3	Applying	Applies what was learned in the classroom in the work place.	Examples: Able to develop mission statement of your organisation.  Key Words: applies, changes, computes, constructs, demonstrates, etc.
2	Understanding	State a problem in one's own words.	Examples: Able to explain steps of change management.  Key Words: comprehends, converts, defends, distinguishes, estimates, explains, etc.
1	Remembering	Recall previous learned information.	Examples: Able to state mission of your organisation.  Key Words: defines, describes, identifies, knows, labels, lists, etc.

**The six levels of learning classification enable you to evaluate participants and to know the extent to which they have learned.** Similarly, you can utilize this model for designing the training course by designing modules in such a way that participants will achieve a lot by going through each level in a step by step manner.

#### Characteristics of learning objectives

Learning objectives should be first of all, consistent with the overall goals of the course. In addition, the SMART rule can be applied.

**SMART means;**

- **S – Specific**
- **M – Measurable**
- **A – Achievable**
- **R – Results Oriented and**
- **T – Time Bound**

**Objectives should specify the target behaviour to be attained and this should be clearly stated.**

Using action verbs for objectives is strongly recommended because a verb can specify the action which is also observable, thus making the objective measurable.

Since the training evaluation will be conducted against the learning objectives, **the objectives should be measurable.** By setting measurable objectives, we will clearly understand how much of the objectives have been achieved through the evaluation process. For example, when we say “able to understand A”, this is sometimes difficult to measure because the meaning of the word “understand” is not clear and understanding is not visible to measure. Thus, “able to explain A” is better as it can be demonstrated and visible enough to evaluate. Other ways of describing objectives include “able to list three elements of A” instead of “explain”. This is more measurable. You can use this approach in situations where participants can list three elements of A.



**It should also be noted that objectives should be achievable.** For example, it is not feasible to make participants great national leader in half a day. When objectives are not achievable, participants are not motivated and it is the same for facilitators as well. It is important to also make objectives appropriate for the level of the participants based on results of the TNA.

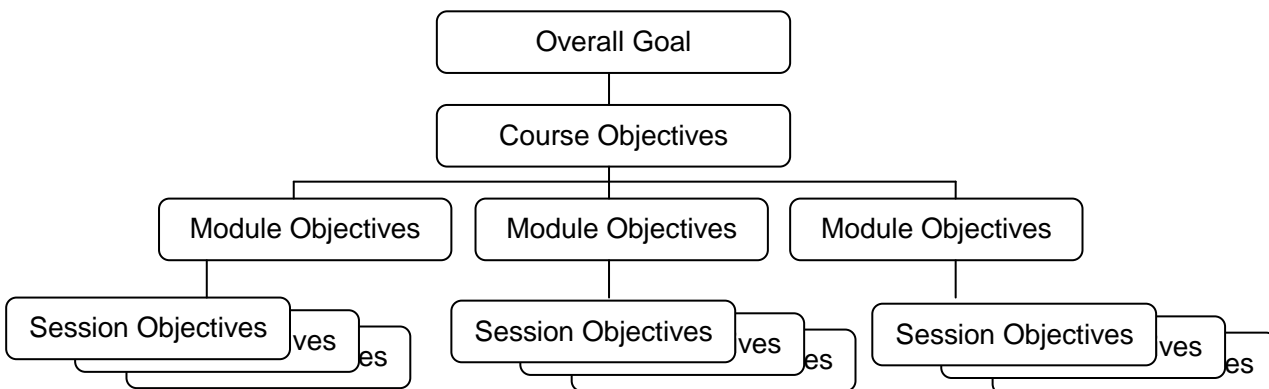
**Learning objectives should be result oriented** and should not focus on the learning process. Just state the result of training.

**Learning objectives should also be time bound.** Usually, it is specified by stating the following; “at the end of the course” or “at the end of the session”, etc.

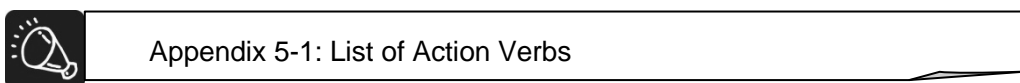
SMART is also applied in setting the overall goals of the training.

Levels of objectives

There are several levels of objective setting such as overall goal of the course, course learning objectives, module objectives, session objectives, and so forth as indicated in a chart below.



The overall goal is to be achieved after the course as the main result of the training. This goal statement guides you in setting learning objectives for the course. Module objectives are set to support course objectives, in the same way session objectives support module objectives. All these learning objectives should consistently support each other towards achieving the overall goal.



5.4 Step-3: Design Motivation

After setting objectives, the strategy to motivate participants should be designed. This is called motivation design. Many of the Instructional Design models tell us about it. Motivation should be designed for the course as well as at the session level. Considering the flow of the whole course, **motivation should be designed in such a way that participants are continuously encouraged to learn and to obtain the expected KSAs in an efficient and effective manner.**

## Gagné's Nine Steps of Instruction

As one of the motivation design model, the Nine Steps of Instruction model was proposed by Robert Gagné in 1985. This model shows standard steps for effective instructions. This can be applied to the course level as well as module/session level.

- 1 Gain attention**
- 2 Inform learners of objectives**
- 3 Stimulate recall of prior learning**
- 4 Present the content**
- 5 Provide guidance for learning**
- 6 Elicit performance (practice)**
- 7 Provide feedback**
- 8 Assess performance**
- 9 Enhance retention and transfer**

### **Step-1: Gain attention**

The first step for effective training is to attract participants. Adult learners are practical so the best approach for gaining attention is to show actual case examples, discuss case studies and so forth. Showing video clips or demonstrations could also be quite attractive.

### **Step-2: Inform learners of objectives**

The next step for effective training is to explain objectives to participants. Participants should understand what they will do and what they will be able to achieve before they start learning. This enables participants to organise their thoughts and this contributes to increasing readiness to learn.

### **Step-3: Stimulate recall of prior learning**

In providing new content, you need to review prior learning or participants' current Knowledge, Skills and Attitudes (KSA). This will promote efficiency of learning by enabling participants to build new KSA on their current base. This is also effective to retain prior learning.

### **Step-4: Present the content**

This is the step to present the new content. However be careful not to put out so much new information. You need to present information in meaningful chunks and blend the information to aid in information recall. Also choose appropriate learning methods to retain the knowledge gained.

### **Step-5: Provide guidance for learning**

In addition to the content, you need to provide guidance on how to learn to participants. Effective communication between facilitators and participants is critical in this step. Using visual aids, actual examples, etc. can provide effective guidance.

### **Step-6: Elicit performance (practice)**

After providing the contents and guidance, it is important to create the opportunity for participants to practice by utilizing the newly acquired KSA. Participants would have to be helped apply the knowledge gained to their own contexts.

### **Step-7: Provide feedback**

Provide feedback on the performance of participants to make them appreciate the extent to which they have learned. Feedback can be through tests, quizzes or verbal comments. Feedback should be specific in such a way that participants can clearly identify what should be changed to improve their performance. "You were doing well" is not specific, but "Your communication to Mr. X was not clear enough because you didn't mention Y" is the right feedback so that participants can understand the specific action to be taken.

### **Step-8: Assess performance**

At the end of the programme/module/session, you need to assess performance of participants in order to evaluate whether the learning objectives have been achieved. Assessments could be in the form of knowledge tests, demonstration tests, questionnaires, etc. Results should be given to participants for them to appreciate how well they have performed.

### **Step-9: Enhance retention and transfer**

In order to retain what has been learned, additional practice at a later time should be encouraged. Before concluding the training course, it is important to help participants apply what they learned to their actual work while thinking through ways through which the KSA acquired can be shared with others.



<Example: Application of Nine Steps of the Instruction Model to EL/QPI Course>

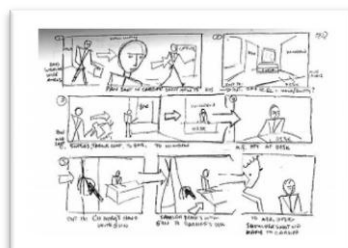
EL/QPI course has been developed based on some instructional design models.

Application of Gagné's Nine Steps of Instruction is explained below.

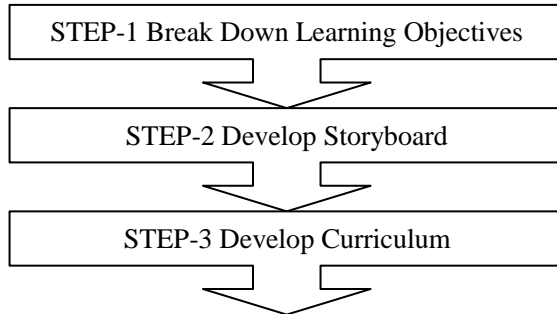
1 Gain attention	The first session is "Relevance of the Civil Servant". This attracts and involves participants by making them reconfirm their role in society as important.
2 Inform learners of objectives	Pre-course Evaluation scheme provides opportunity for participants to understand objectives clearly. The template for lesson plan indicates that learning objectives will be presented in every session.
3 Stimulate recall of prior learning	Training Coordinator is expected to connect each session to the next for a smooth transition by highlighting the big picture for the course.
4 Present the content	Facilitators have been trained in instructional design to present content in an effective manner.
5 Provide guidance for learning	Template for lesson plan includes appropriate activities such as group discussions, hands-on exercises to guide participants.
6 Elicit performance (practice)	Action Plan provides participants to apply what they learned. Many sessions include demonstration exercises so that participants can apply what they learned.
7 Provide feedback	Monitoring process of Action Plan implementation provides feedback on progress and performance. Demonstration type of exercises can provides feedback.
8 Assess performance	Impact survey conducted over a period of time provides assessment of performance. Action Plan formulation at the end of the course could function as an assessment tool.
9 Enhance retention and transfer	Action Plan implementation contributes to retention of KSA obtained in the course. Action Plan implementation provides a transfer mechanism. In every session, participants are guided to think about how to develop "Action Points" related to the session.

### Storyboard Development

The Storyboard is the set of illustrations or images showing a story in sequence. This technique has been extensively used in the process of developing movies and animations e.g. cartoons.



This technique can also be applied to designing training course with consideration of the Nine Steps of Instruction model. **It enables instructional designer to organise the flow of the course in an efficient manner by focusing on the learning process towards achieving the set objectives.** Generally, storyboard development has 3 steps shown below.



**Step-1: Break down learning objectives into topic list**

Once learning objectives of the course are set, the objectives are broken down into a list of topics. In this process, the topics should not be so detailed. For example, if the programme is a 5 day course, the number of topics can be 10 to 20, or one topic would be the content that can be learned in a few hours that is usually equivalent to a session.

**Step-2: Develop storyboard**

The storyboard can be developed with reference to the list of topics. A description using words for the story is sufficient. A nice story can be developed using the topics rather than just putting topics in a sequence.

Bad storyboard for "Leadership Development"	
Good storyboard for "Leadership Development"	

Organise topics in a fluent story towards the learning objectives of the course, taking into account the results of the TNA and motivation design. Missing topics in this step, could be added.

### **Step-3: Develop Curriculum**

Transfer the storyboard developed into a form of curriculum, which includes module/session title, module/session objectives, duration, list of topics, etc. In this step, the length of time to be allocated for each chunk of learning should be well examined. The module or session framework is then developed based on this and learning objectives at this level should be set. This becomes a core of the programme design.



Appendix 5-2: Curriculum Example

## **5.5 Summary**

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In this module, effective programme design focusing on how to design curriculums has been explained. Setting learning objectives is the first and important step in the process. Objectives should be described for each KSA area using action verbs. The evaluation criteria should be considered in setting the objectives. This module introduced two design models such as Blooms Taxonomy and Gagné's Nine Steps of Instruction. Blooms Taxonomy indicates 6 levels of learning namely; Level-6:Creation, Level-5:Evaluation, Level-4:Analysis, Level-3:Applying, Level-2:Understanding, Level-1:Remebmering and help organise learning objectives. Gagné's Nine Steps of Instruction recommends 9 steps for effective instruction such as; Gain attention, Inform learners of objectives, Stimulate recall of prior learning, Present the content, Provide guidance for learning, Elicit performance (practice), Provide feedback, Assess performance, Enhance retention and transfer and help design motivation. Storyboard technique is effective to create flow of training course.



“Let’s improve description of learning objectives”

1. Editing learning objectives

Let’s examine each of the following objectives from a leadership programme and decide if it is a well-stated learning objective. If not, change it so that it is acceptable, noting what components (condition, behaviour, criteria) needs to be changed.

1. Develop an understanding of the leader’s role.
2. Know the difference between authority of rank and authority of respect.
3. Understand the theories of motivation.
4. Know the characteristics of a leader.
5. Know the role of the manager in a team environment.
6. Appreciate the advantages and disadvantages involved in group problem-solving and decision-making.
7. Identify ways to motive employees.

2. Writing your own objectives

Choose a particular topic from your own situation and write three learning objectives that include all three components. Use the Workshop Objectives Worksheet below. In the space to the right of each item, write the specific pieces of information that will be used to satisfy that component.

<b>Workshop Objectives Worksheet</b>	
<b>Subject:</b>	_____
<b>Condition</b>	<ul style="list-style-type: none"> <li>• What the participant will be given</li> <li>• Tools, supplies, equipment</li> <li>• Use of notes, simulated situation</li> </ul>
<b>Behaviour/action</b>	<ul style="list-style-type: none"> <li>• What the participant will be doing</li> <li>• Emphasis on verb</li> <li>• What can be observed</li> </ul>
<b>Criteria</b>	<ul style="list-style-type: none"> <li>• What standard apply</li> <li>• Time limits</li> <li>• Degree of accuracy</li> <li>• Level of performance</li> </ul>

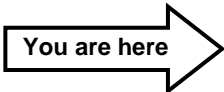
For example, the objective is “Participants will know the characteristics of a leader” is not specific enough. In this example, the trainer will be giving the participants “results from several recent studies on leadership” (condition). Having given that information, the trainer then expects the participants to be able to “identify” (behaviour) “six characteristics of effective leaders in a team environment” (criteria).

As you can see, the worksheet can help you identify the components more easily. You can then put these components together to create a useful and meaningful learning objective: “Using the results of several recent studies on leadership, participants will identify the six characteristics of effective leaders in a team environment”.

At first, the writing of learning objectives may seem difficult, tedious, and time-consuming. With practice, though, it will become easy. After you have determined the learning outcomes, you are ready to design your training course.



## Module-6 Phase-2: Training Program Design --Lesson Plan Development

Module-1	Human Resource Development (HRD) Framework
Module-2	ADDIE Process Model
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
Module-5	Phase-2: Training Programme Design –Curriculum Design
 You are here	<b>Module-6 Phase-2: Training Programme Design –Lesson Plan Development</b>
Module-7	Phase-3: Training Resource Development
Module-8	Phase-4: Training Implementation –Training Delivery
Module-9	Phase-4 Training Implementation –Classroom Facilitation
Module-10	Phase-5: Training Evaluation

### Learning Point of This Module

Before you deliver a session, it is important to develop an effective lesson plan. In order to make participant’s learning effective and efficient, you should communicate the learning objective and approach to your participants. Selecting the appropriate teaching method and plan time lines of session depending on the training contents and nature of participants.

**In this module, you will learn how to develop effective plans by applying ID models.**

At the end of this module, **you will be able to:**

- **Explain the importance of developing lesson plans**
- **Explain how to analyze course information and list of participants**
- **List and explain 5 teaching methods**
- **Develop an effective lesson plan**

List of contents of this module:

- 6.1 What is Lesson Plan?
- 6.2 Understanding Training Course and Participants
- 6.3 Setting session Objectives
- 6.4 Listing Up Learning Topics
- 6.5 Determining Participant’s Assignments
- 6.6 Selecting Teaching Methods
- 6.7 Determining Assessment Strategy
- 6.8 Planning Time Line
- 6.9 Listing Up Necessary Items and Environments

- 6.10 Filling Out Lesson Plan Form
- 6.11 Summarizing Programme Design
- 6.12 Summary

## 6.1 What is Lesson Plan?

**Lesson planning is a map towards bringing participants to the desired goal of the session.**

Each facilitator should prepare a “Lesson plan” for each session based on the curriculum. Below is a template of lesson plan.

Appendix 1  
1st Ethical Leadership for Quality/Productivity Improvement Course for Sierra Leone and Liberia (19 Sep-7 Oct 2011)

**Lesson Plan**

**Note: Please prepare the lesson plan for each \*SESSION (120 min.)\***

Chapter:

Module:

Topic(s):

Facilitator Name:

(1) Learning objectives of the Topic(s)

(2) List up Learning points in this session

(3) Evaluation methods/ Questions  
(How can you know if the objectives are achieved or not? What question will you ask?)

Appendix 1  
**(4) Time-line (TOTAL 120 min.)**

Time Allocation	Accumulated Time	Lesson Plan	Training Methodology/ Necessary equipments etc.

Lesson plan development usually takes the steps below:

1. **Understanding training course and participants**
2. **Setting session objective**
3. **Listing up learning topics**
4. **Determining participant’s assignment**
5. **Selecting teaching methods**
6. **Determining assessment strategy**
7. **Planning time line**
8. **Listing up necessary items**
9. **Fill out lesson plan form**

## 6.2 Understanding Training Course and Participants

In the process of preparing the lesson plan, it is important to understand the course and the target participants. **First, study the course outline and examine the objectives and background**

**for it.** It is important to listen to those concerned about the background of the course. Sometimes facilitators can obtain unofficial information related to the course or participants' selection. **When the list of participants is confirmed, study it and identify their affiliations, titles, experiences, their motivations for participation and so forth.** However, when the list is not confirmed, obtain as much information as possible from the administration staff or course coordinator. It is necessary to check their level and mindsets on the topics. This information should be considered when facilitators design the session strategy.

The TNA Report on Liberia and Sierra Leone will provide information such as the general situation of the Civil Service and the mindsets of the Civil Servants in these countries.

From training course information, facilitators can obtain information such as;

- Objective of training (Framework of training such as how it will contribute to organisation's goal, what problems will be solved, etc.)
- Overall schedule of training
- Screening process of participants

From list of participants, facilitators can obtain information (depending on a form such as);

- Age
- Sex
- Year of service in the current organisation and job
- Current job
- Education background

When pre-training report is submitted, facilitators can obtain more detailed information (depending on a form) such as;

- Role and responsibility of current job
- Number of staff including number of colleague and subordinates
- Working environment
- Issues in organisation
- Issues in current job

Based on analysis of above information, facilitators can plan strategy of session.



<Example: Reading information for effective course delivery>

When you examine training course information, list of participants and pre-training report, you can estimate their abilities and motivations. Examples of analysis are as follows;

- If the training course information indicates that participants are automatically selected when they are promoted to department manager, you can estimate that they will be highly motivated and have some worry about change of their roles in organization.
- If the list of participants indicates that most participants are not young but years of service in current organization is short e.g. less than one year, you can estimate that their basic human skill is high but they do not have sufficient technical knowledge required for the job.
- If pre-training reports indicates that most participants focus on lack of resources (uncontrollable factors) in their organization to perform their roles, you can project that they are frustrated with current situation and less motivated.



<Self-Check>

Let's check what information you usually check in advance.

- Course outline
- Training time table
- List of participants
- Pre-course evaluation summary
- Trainee's manual
- Evaluation of past courses
- Other background information (communicate with organisers)
- Others

### 6.3 Setting Session Objectives

**Firstly, facilitators need to set a goal or objectives for their sessions.** The module objective is already provided in the Curriculum. When in charge of a part of a module, the module objectives must be broken down into session objectives that cover the topics in your session.

**The learning objective is to be set by the three dimensions of KSA namely; 1) Knowledge, 2)**

**Skill, and 3) Attitude** (see 3.5 above). With knowledge, facilitators ask themselves what areas of knowledge they want participants to understand at the end of a session. For skill, facilitators ask themselves what skills they want participants to actually exhibit at the end of a session. With Attitude, facilitators ask themselves what feelings they want participants to have at the end of a session. All these should be determined when considering training course objectives. A session forms a part of the overall goal of the training course.

#### 6.4 Listing Up Learning Topics

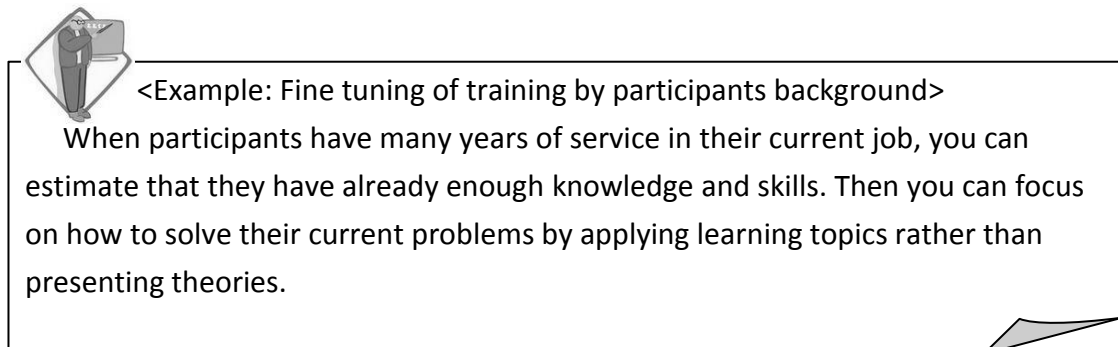
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**Facilitators have to list up learning topics covered in a session from the Trainee’s Manual.** Facilitators select topics from trainee’s manuals in such a way that the session objective will be fulfilled. **Priority can be given to topics that are centred on hot issues, relevant to the participants and their organisations.**

**It is also useful to introduce current trends relating to the topics.** When facilitators find that the Trainee’s Manual does not have enough topics to achieve its objectives, they can consult the organisers of the training course and introduce additional topics when agreed. In order to identify current issues, Robert W. Pike suggests three (3) actions in his book entitled “Creative Training Techniques Handbook”. They are;

- What articles on the topics have appeared in publications in the past 12 – 24 months?
- What books have been published on the subject in the past years?
- What topics appear again and again on conference programmes?

The TNA Report will help facilitators prioritize the topics. With these selected topics, provide a map to the session goal.




<Example: Fine tuning of training by participants background>  
When participants have many years of service in their current job, you can estimate that they have already enough knowledge and skills. Then you can focus on how to solve their current problems by applying learning topics rather than presenting theories.

#### 6.5 Determining Participant’s Assignments

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**Facilitators determine what participants will submit at the end of the session or after the session.** It is effective to get participants to create something and submit it as a summary of their learning. This is not necessary for all the session. By announcing the outputs expected from the participants, facilitators will be able to make clearer the session goal and provide the appropriate pressure and trigger the involvement of participants. Just instructing participants to summarize what they learn in the session by writing a few sentences will be effective to keep participants’ concentration to pick up something important from the session.

**When facilitators give assignment, they should gather, check, and give feedback.** Making participants write reports and do nothing on it will disappoint participants and discourage for the rest of training.



<Example:  
 Apply what participants learn by giving assignment>  
 In order to confirm applications of what participants learned to their work places, it is important to give an assignment report to make them describe what is to be done in their work places. Below is an example of assignment instruction.

<Assignment Instruction>

Write a one page report on how to apply what you learned in today’s session in your work place. Please consider these factors when you write this report.

- ✓ Focus on just one or two skills, which you acquired in the session.
- ✓ Describe realistic steps to apply them and mention rough time line for it.
- ✓ List challenges in applying them.
- ✓ List possible solutions
- ✓ List bosses, subordinates and colleagues who needed to be communicated.

## 6.6 Selecting Teaching Methods

**In order to achieve a session goal, facilitators should select the most efficient and effective method of teaching.**

Remember Confucius said “What I hear, I forget, what I see, I remember, but what I do, I understand.” The most effective method is making participants do something. Thus, doing something such as exercises involving participants should not be forgotten.

It is not effective to use only one method throughout your session because participants get bored soon.

List of teaching methods and their characteristics are summarized in the table below.

Method	Advantages	Disadvantages
Lecture	<ul style="list-style-type: none"> <li>● Efficient for providing knowledge and concepts</li> </ul>	<ul style="list-style-type: none"> <li>● Provision of knowledge does not always means that recipients understand it</li> </ul>
Demonstration	<ul style="list-style-type: none"> <li>● Effective to attract interest</li> <li>● Effective to motivate to learn by showing the result of learning</li> </ul>	<ul style="list-style-type: none"> <li>● Difficult to create an environment for demonstration</li> <li>● Requires facilitator’s skill</li> </ul>

Practical exercise (Individual or small group)	<ul style="list-style-type: none"> <li>● Effective to help understand how to apply acquired knowledge and to retain it</li> </ul>	<ul style="list-style-type: none"> <li>● Needs personal care to monitor the processes</li> <li>● Speed varies with participants</li> </ul>
Case study	<ul style="list-style-type: none"> <li>● Effective for training in problem solving capability</li> <li>● Offers a dynamic process of learning</li> </ul>	<ul style="list-style-type: none"> <li>● Difficult to create a case</li> <li>● Requires facilitator's skill to lead participants</li> </ul>
Project	<ul style="list-style-type: none"> <li>● Effective to develop total capability on the topics</li> </ul>	<ul style="list-style-type: none"> <li>● Time consuming</li> <li>● Needs follow up</li> </ul>
Business Game/Simulation	<ul style="list-style-type: none"> <li>● Effective to help understand participant's personal character</li> <li>● Effective to create teamwork when it is done by group</li> </ul>	<ul style="list-style-type: none"> <li>● Difficult to create a game</li> <li>● Needs personal monitoring and feedback</li> </ul>
Small Group discussion	<ul style="list-style-type: none"> <li>● Effective to understand and retain the topic</li> </ul>	<ul style="list-style-type: none"> <li>● Sometimes, not all the members equally participate</li> </ul>
Role Playing	<ul style="list-style-type: none"> <li>● Effective to help understand how to apply acquired knowledge and retain it</li> <li>● Facilitator can check the learning level</li> </ul>	<ul style="list-style-type: none"> <li>● Requires facilitator's skill for effective feedback</li> </ul>

The curriculum provides a rough idea of the session by specifying timelines and methodologies. Facilitators can follow it and determine their plans in detail.



<Example: Effective teaching methods for adults>

Let's check some teaching methods based on the view point of Andragogy –**PMERGE** (see 3.1 above).

A case study is one of the favourite methods of adult learning. This is because case studies fulfill most of PMERGE requirements. Cases are **P**ractical and realistic stories. This method allows participants to speak up in an independent manner. Participants can contribute to solving problems in the case study by utilizing their own real life **e**xperiences.

Practical exercises also fulfill most of PMERGE requirements. An exercise is a **P**ractical work. Doing something is usually **M**otivating than just listening, **E**xercise is an **A**utonomous activity controlled by participants themselves. Exercise has usually clear **G**oal as output.

## 6.7 Determining Assessment Strategy

**Facilitators should assess level of learning or progress made by participants in order to confirm achievement of the session objectives. A simple way is to occasionally pose questions/quiz to the class.** If facilitators need a detailed and precise assessment, they can ask for a test on paper at the end. **It is a good idea to ask each participant to say one word regarding what they learned at the end of the session.** Facilitators can assess the achievement of

participants by their comments.

Another idea is to ask participants to evaluate their learning through a feedback questionnaire. Facilitators can ask, for example, “Are you satisfied with what you have learnt on negotiation skills?”



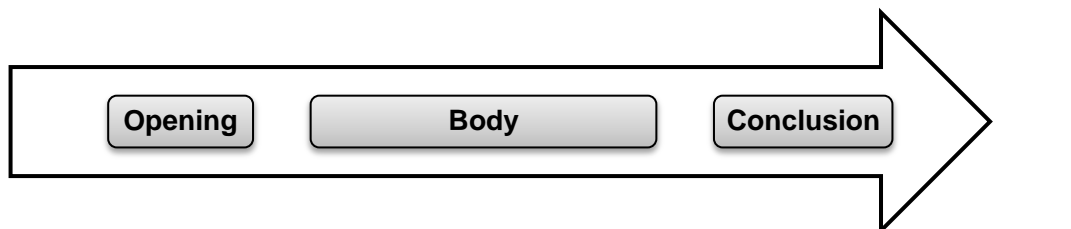
<Example: Assessment by asking>

In order to facilitate the application of what participants learn to their workplaces, you can inform participants at the beginning that they will be asked to comment shortly on how to apply what has been taught in their real working environment at the end of the session. This announcement makes participants concentrate on the session and try to summarize something which they can pick up to apply in their work.

## 6.8 Planning Time Line

This is the process of creating the strategy of a session delivery based on determined 1) session objectives, 2) learning topics, and 3) session outputs. Facilitators make their plans of the session delivery with time lines. **Remember the 90/20/8 rule** (see 3.5 above). **Facilitators need to change your pace every 20 minutes by using various methods.**

When facilitators make a time line of a session, **the basic structure is 1) Opening 2) Body and 3) Conclusion.**



### 1) Opening

The opening is very important because people usually remember what was done at first. **The first activity usually impacts significantly on participants. The opening topic should be relevant to the session content.** It is not a mere icebreaking to make participants relax. Remember “Andragogy” (see 3.1 above), participants are practical and are seeking to find something to solve their problems. Facilitators should plan their opening activity in such a way that participants can feel the usefulness of the session to them. Important factors of opening include:

- a) **Breaking preoccupation** --- Participants are usually preoccupied with some other things in their minds. Maybe they are thinking of something related to previous sessions, their jobs at offices, their personal matters, etc. Facilitators need to draw their attention to get them to concentrate on a session in the beginning.
- b) **Creating comfortable atmosphere** --- It is important to create a comfortable and friendly



atmosphere in a classroom between facilitator and participants and among participants.

- c) **Getting attention to a session** --- It is recommendable to provide fun activity. Funny elements are not always needed. However, it can increase participants' interest by making them realise that this is not going to be another boring presentation.

## 2) Body

**Facilitators should deliver the selected topics with appropriate methods based on a strategy so that participants are always motivated and devoted to learn. Remember the P-MARGE of Andragogy, PIE Rules ARCS model, etc.** Also remember the old saying "What I hear, I forget, what I see, I remember, but what I do, I understand." All of the activities should be following the concept of these instructional design models so that session will be effective. Also remember to apply the 90/20/8 Rule and change pace every 20 minutes by using various methods of teaching and involve participants in some ways every 8 minutes.

In developing a plan, **it is recommended that relevant small stories are introduced.** Such small stories can be facilitators' own experiences, current trends, or issues relevant to the topics. It is important to touch on facilitators' own experiences to elaborate on the topics. Personal stories will be persuasive and more attractive to participants. Remember the P of the PIE Rule, which is Practical.

**It is important that facilitators always ask participants how they intend to apply what they learnt in their working places.** Remember that the purpose of any training course is to deliver results. Facilitators should keep coming back to the training objectives and to reconfirm the role of a session in the whole training course.

## 3) Conclusion

Facilitators summarize the session and assess the level to which the session objective(s) has been achieved by participants. **Reconfirm participants how they intend to apply what they learnt in their working places.** Finally, express appreciation to participants and motivate them to keep on learning.

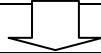
After you develop your plan, it is strongly recommended to rehearse to check the time line and adjust it when necessary. **Rehearsing from the through beginning to end will provide an idea of the effectiveness of the session plan.**



<Example: 90 minutes Session Plan>

An example of the time line of “Session 2: Strategic Planning” of the Module 5 of Leadership Chapter is presented below.

Teaching/learning methodology provided by the Curriculum		
Part-1	60 minutes	Presentation and discussion on strategic planning
Part-2	30 minutes	Group exercise on vision, mission and environmental scan, and presentation



Time Allocation	Curriculum	Lesson Plan
<b>Part-1</b>		
5 minutes	Introduction	<ul style="list-style-type: none"> <li>● Self-introduction focusing on my experience of strategic planning.</li> </ul>
10 minutes	Opening (Class discussion)	<ul style="list-style-type: none"> <li>● Ask 2-3 participants to share their experience of strategic planning.               <ul style="list-style-type: none"> <li>✓ Pick up elements of strategic planning from their experiences</li> <li>✓ Point out good points and points to be improved</li> </ul> </li> </ul>
15 minutes	Presentation	<ul style="list-style-type: none"> <li>● PowerPoint presentation: Provide knowledge of topics below               <ul style="list-style-type: none"> <li>➤ Definition</li> <li>➤ Conducting a SWOT analysis</li> <li>➤ Developing organisation vision and mission</li> </ul> </li> <li>✓ Involve class by giving questions less than 8 minutes to ensure understanding</li> </ul>
10 minutes	Class discussion	<ul style="list-style-type: none"> <li>● SWOT Analysis exercise               <ul style="list-style-type: none"> <li>✓ Pick up one participant and try SWOT analysis of his/her department</li> </ul> </li> </ul>
20 minutes	Presentation	<ul style="list-style-type: none"> <li>● PowerPoint presentation: Provide knowledge of below topics               <ul style="list-style-type: none"> <li>➤ Development of objective</li> <li>➤ Development of output</li> <li>➤ Development of activities</li> <li>➤ Development of action plan</li> <li>➤ Development of M&amp;E system</li> <li>➤ What is SMART?</li> </ul> </li> <li>✓ Involve class by giving questions less than 8 minutes to ensure understanding</li> </ul>
<b>Part-2</b>		
3 minutes	Presentation	<ul style="list-style-type: none"> <li>● Instruction of group exercise               <ul style="list-style-type: none"> <li>✓ Explain the process by using PowerPoint and support materials</li> <li>✓ Participants will be divided into 4 groups.</li> </ul> </li> </ul>
20 minutes	Group exercise	<ul style="list-style-type: none"> <li>● Group Exercise               <ul style="list-style-type: none"> <li>✓ 15 min.: Group member discuss and write vision and mission of selected member’s department</li> <li>✓ 4 min.: Each group will present their result in 1 minute.</li> <li>✓ 1 min.: General comments by a facilitator</li> </ul> </li> </ul>
7 minutes	Conclusion (Discussion and presentation)	<ul style="list-style-type: none"> <li>● Class discussion on the issues of strategic planning               <ul style="list-style-type: none"> <li>✓ Ask participants what will be problems or issues when they make strategic plan at their working places.</li> <li>✓ Discuss the expressed opinions</li> </ul> </li> <li>● PowerPoint presentation: Summary of the session by providing some key questions below.               <ol style="list-style-type: none"> <li>1) What profound shifts are or will influence our future?</li> <li>2) What is our direction and response to these shifts?</li> <li>3) What are the elements at the Mega level that we must address? And Why?</li> </ol> </li> </ul>

			4) How will we describe our desired results in measurable terms? 5) What are the best ways and means to get there? 6) How will we measure progress? 7) How will we measure success? 8) How will we revise the strategy as required?	
*Total 90 minutes.				

## 6.9 Listing Up Necessary Items and Environments

**Now facilitators would have list up all the necessary items for a session such as learning materials, stationery, and equipment (PC, Projector, whiteboard).** It is better to specify in details. For example, if 3 colours of whiteboard markers are needed, facilitators should specify the colours such as black, blue, and red. Classroom environment such as layout also should be determined. When group exercise is included, sometimes special items and classroom environments are necessary.

Usually, preparation is done by the training coordinator and not by facilitators themselves. Thus this memo is useful for them to contribute towards increasing the efficiency of training delivery.



<Example: PC speakers are sometimes forgotten>

These days, classrooms are usually equipped with PC, projector and screen. However, speakers are not often connected. Sometimes it is observed that the coordinator is running around to find speakers asked by the facilitator just before the session. More facilitators use sound effect in their PowerPoint presentation or show video recently. With detailed lesson plan, this chaos can be avoided.

## 6.10 Filling Out Lesson Plan Form

After all the above-mentioned details have been confirmed, facilitators would have to fill out a Lesson Plan form. **This form would be used by the training coordinator as instructions for preparation and classroom management, as well as by the facilitator himself/herself. This also contributes to quality assurance of the training delivery.** Training institutions can assure quality by checking lesson plans. Facilitators can improve their sessions by improving lesson plans. Delivery should be flexible because sometimes the plan and actual delivery could be different. Here, it is very important to revise plans based on experience and feedback from participants. When these lesson plans are well maintained, the PDCA<sup>4</sup> cycle can be implemented and continuous improvement is enhanced.

A compilation of lesson plans can be utilized as manual for other facilitators when they deliver

<sup>4</sup> PDCA Cycle: Management method of improving processes. PDCA stands for Plan, Do, Check and Act.

new sessions. In other words, **preparing lesson plans is a visualization of training delivery and makes it possible to share facilitator's personal know-how with others concerned.** Thus preparing and maintaining lesson plans support quality assurance and improvement of training courses.

### 6.11 Summarizing Programme Design

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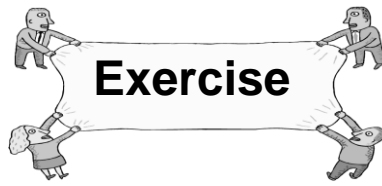
After developing lesson plans for all the sessions, summarize topics and the methodologies including the lesson plans into a document. This document should include the elements indicated below.

- Course title
- Duration
- Target Participants
- Background of the course
- Overall goal
- Course learning objectives
- List of topics
- Course time Table
- Session objectives for each session
- List of topics for each session
- Learning method for each session
- Lesson Plans for each session
- Description of each session

### 6.12 Summary

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It is clear that preparation by developing lesson plan is the success factor of every training delivery and practice makes perfect. The lesson plan is prepared by understanding the training course and participants, setting session objectives, listing up learning topics, determining participant's assignments, selecting teaching methods, determining assessment strategy, planning time line, listing up necessary items and environments, and filling out a form. Preparing lesson plan is a planning strategy on how to facilitate to achieve the goal of the training course by considering the background of participants following the Instructional Design approach. It should also be noted that maintaining lesson plans is important for quality assurance and improvement of training courses.



“Let’s make a lesson plan!”

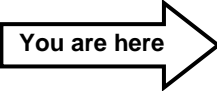
Let’s make your lesson plan. If you have the experience of teaching before, pick up one of your sessions and make a lesson plan by applying what you learned in this module. If you have not taught before, you can pick up one of your favourite topics and make an ideal lesson plan.

Lesson plan should include at least items below.

- Session Title
- Session objectives
- Topics included
- Evaluation methods
- Training methods and topics with time line
- Items to prepare

You can refer to “5.1 What is Lesson Plan?” as a form but you can revise it for your convenience. After completing your plan, share with other facilitators and provide each other comment.

## Module-7 Phase-3: Training Resource Development

Module-1	Human Resource Development (HRD) Framework
Module-2	ADDIE Process Model
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
Module-5	Phase-2: Training Programme Design –Curriculum Design
Module-6	Phase-2: Training Programme Design –Lesson Plan Development
 You are here	<b>Module-7 Phase-3: Training Resource Development</b>
Module-8	Phase-4: Training Implementation –Training Delivery
Module-9	Phase-4 Training Implementation –Classroom Facilitation
Module-10	Phase-5: Training Evaluation

### Learning Point of This Module

Learning resources are a critical factor for successful training. There are four categories of resources namely; Learner’s Guide, Learner’s Workbook, Presentation Materials and Support Materials. The Learner’s Guide is the main content of the training program sometimes called Learner’s Manual, and the Learner’s Workbook forms the base of learning activities for participants’ work. Presentation Materials are used by facilitators during presentations. Support Materials are used for group exercises such as case studies, additional explanations, etc. A successful development phase draws upon the information collected in the needs analysis phase and the decisions made in the programme design phase.

Good learning resources support facilitators to teach and participants to learn efficiently and effectively. When time constraints do not allow a facilitator to cover all the topics, participants can learn independently if it is well organised and self-explanatory. When participants want to learn more, additional learning resources will help them to study further.

At the end of this module, **you will be able to**

- **Explain what is involved in developing effective learning resources**
- **Identify the necessary learning materials for a training program Develop effective PowerPoint slides**

List of contents of this module:

- 7.1 Types of Learning Resources
- 7.2 Steps for Learner’s Guide Development

- 7.3 Effective PowerPoint Slides
- 7.4 How to Develop Effective PowerPoint Slides
- 7.5 Effective Support Materials
- 7.6 Other Resources for Presentation
- 7.7 Summary

## 7.1 Types of Learning Resources

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### Learner's Guide

It is also known as the learner's manual which **explains the content of the course by including the full content and describes details of each topic for the course.** It is designed to support and maximize the learner's learning. It contains sections of chapters and related reading resources that have been put together as a skill-focused learning package.

**The purpose of the Learner's Guide (LG) is to help the learner acquire specific understanding on the subject** taught during the training session.

### Learner's Workbook

**The Learner's Workbook consists of the learning resources that participants will follow in the training room. It provides a summary of the content and activities such as exercises related to the topic under discussion.** For courses that are skills-focused, the workbook can provide practical aspect such as hands-on experiences. Ideally, the workbook should be self-explanatory to enable learners to learn independently. There are various types of workbooks. The simple end type for example only includes the title of the topic and questions to check the level of understanding of participants, so that they are not totally dependent on the workbook alone. This type of workbook is used in a classroom under a trainer's facilitation. On the other hand, the detail end type includes the full content of the course with exercises, quizzes, check tests, etc. in a self explanatory manner so that participants can learn without any facilitation. In this case it can be called a Learner's Guide or Learner's Manual.



### Appendix 7-1: EL/QPI Course Learner's Workbook

### Support material

**The Support material on the other hand, helps participants to carry out activities through instructions on what to do.** It is used to substantiate the content and activities of the course. Examples of this type of support materials are instruction sheets for group work, handouts, templates, checklists, case studies, etc. It adds additional information related to the topic. Also, when necessary, **facilitators can prepare support materials which provide additional information on what the Learner's Manual does not provide.**

## Presentation Material

**The presentation material is the story of a training session and helps participants understand the Facilitators' instructions.** Like Presidential speeches, presentations can be made without materials. However, it is recommended that you include some materials to support your presentation. Presentation materials are usually made using PowerPoint.

## Facilitator's guide

It is also called an Instructional Guide. It is not distributed to participants, but used by facilitators. **It ensures that learning objectives are achieved through instructing facilitators on how to deliver the course.** It sometimes includes the facilitator's role and responsibilities as well as the lesson plan and presentation materials. A Facilitator's Guide is an "expanded" version of the lesson plan.

It is advisable to develop a matrix for learning resources used in a training course.



<Example: Lineup of learning resources for EL/QPI Course>

In Ghana, CSTC's EL/QPI course for Sierra Leone and Liberia has five learning resources namely;

- 1) Trainee's Manual (Learner's Guide),
- 2) Learner's Workbook,
- 3) Presentation Materials (PowerPoint),
- 4) Support Materials, and
- 5) Facilitator's Guide.

In this system, the Learner's Workbook is in-between the simple end and detail end types. It includes a summary of the content, exercises and some questions for reflections.

The example of a matrix for the EL/QPI Course learning materials is presented below;

Materials	Role (how it is used)	Simple description	Component
Learner's Guide (Learner's Manual )	<ul style="list-style-type: none"> <li>•(Participants) Reference for in-depth understanding of course content</li> <li>•(Facilitators) Base for session content</li> </ul>	<ul style="list-style-type: none"> <li>•It describes details of each topic for the course.</li> </ul>	<ul style="list-style-type: none"> <li>•All the topics are included in detail.</li> </ul>
Learner's Workbook	<ul style="list-style-type: none"> <li>•(Participants) Followed to learn in classroom</li> <li>• (Facilitators) Followed to facilitate by trainers</li> </ul>	<ul style="list-style-type: none"> <li>•It describes essence of each topic and activities in each session</li> </ul>	<ul style="list-style-type: none"> <li>•Topic</li> <li>•Sub-topics</li> <li>•Session Objectives</li> <li>•Summary of topic/sub-topics</li> <li>•Skills identification</li> <li>•Activities (exercises, case studies, etc.)</li> <li>•Lessons learned</li> <li>•Action points</li> <li>•Appendix (reference, support materials)</li> </ul>



Support Materials	<ul style="list-style-type: none"> <li>•(Participants) Additional activities Reference for future learning</li> <li>•(Facilitators) Additional materials for facilitating</li> </ul>	<ul style="list-style-type: none"> <li>• It provides additional activities</li> <li>• It provides additional information related to the topics</li> </ul>	<ul style="list-style-type: none"> <li>•Activities (exercises, case studies, etc.)</li> <li>•Activity instructions</li> <li>•Code of conduct</li> <li>•Citizen's charter</li> <li>•African Service Charter</li> <li>•Constitution</li> <li>•Policy, etc.</li> </ul>
Presentation Materials (PowerPoint)	<ul style="list-style-type: none"> <li>•(Participants/Facilitators) Material for presentation</li> </ul>	<ul style="list-style-type: none"> <li>• It describes essence of each topic</li> </ul>	<ul style="list-style-type: none"> <li>•Key points for presentation by facilitators</li> </ul>
Facilitator's Guide	<ul style="list-style-type: none"> <li>• Guide for facilitators</li> <li>• Standard for course content development for CSTC</li> </ul>	<ul style="list-style-type: none"> <li>• It describes how to present content and proceed with session</li> <li>•Details explanation of Learner's Workbook</li> </ul>	<ul style="list-style-type: none"> <li>•Facilitator's role and responsibilities</li> <li>•Facilitation guide and know how</li> <li>•Content outline</li> <li>•Session time lines</li> <li>•Appendix (reference, support materials, PPT)</li> </ul>



<Self-Check>

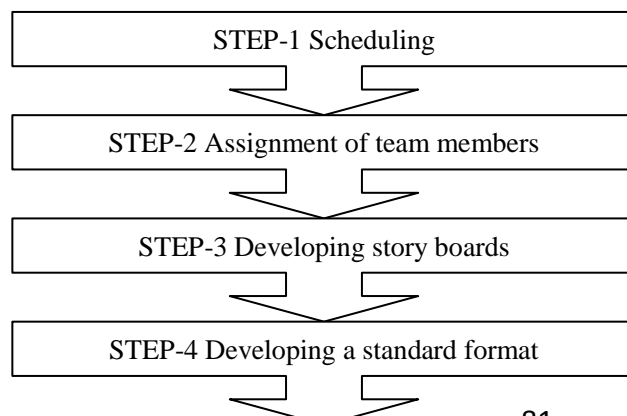
Let's list up possible support materials for facilitating participants' learning for your sessions.

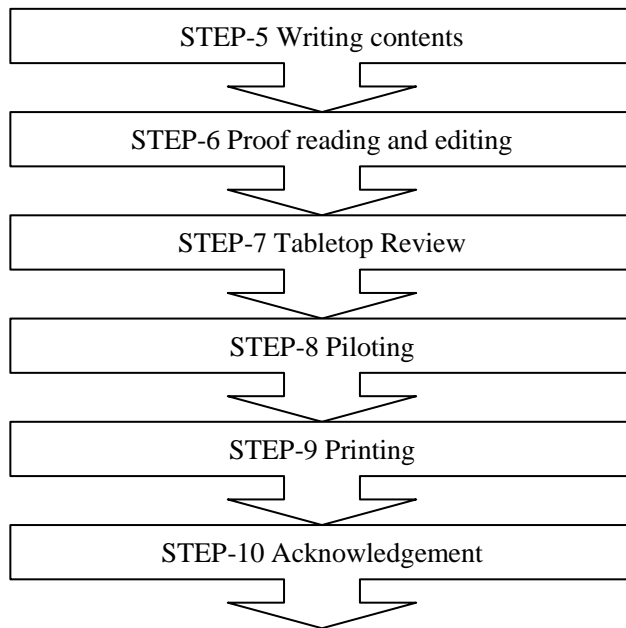


Appendix 7-2: EL/QPI Course Facilitator's Guide

## 7.2 Steps for Learner's Guide Development

This is developed after confirming what learning resources or materials are needed. When the material is short and light, it can be developed by one person. However, when it is long with many pages including a variety of topics, **it is necessary to involve expert who have knowledge on the topics and skills that the work required to complete the material.** The basic steps in the flowchart below are recommended to be followed by the team. In this section, the steps are described mainly for the development of the Learner's Guide. However, these could be applied to any type of resources. These steps could also be applicable if the materials are developed by one individual.

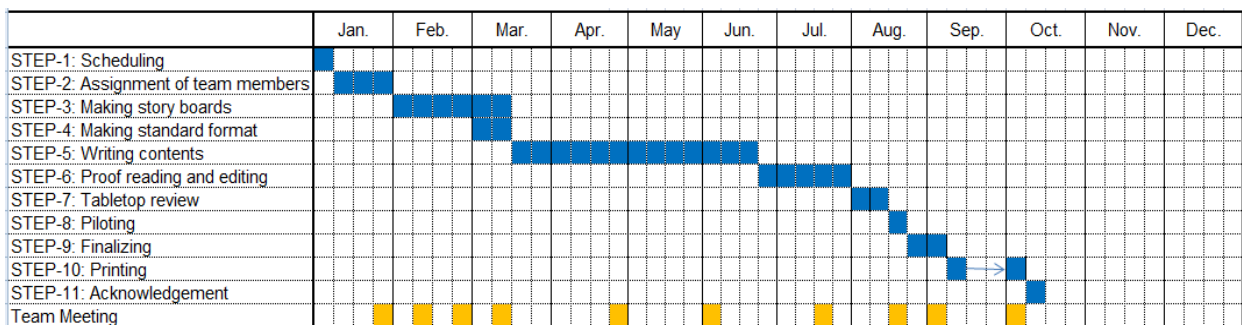


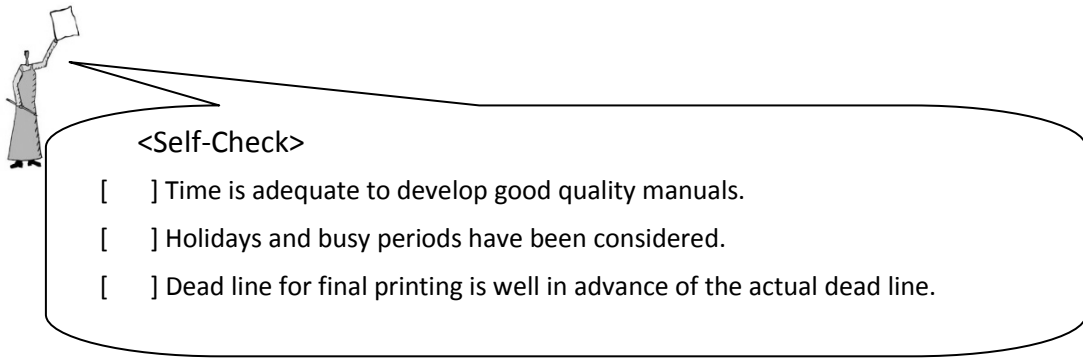


**STEP-1: Scheduling**

Scheduling the development of the Learner’s Guide is the first action to be taken. **Scheduling is set backwards based on the expected date of use of the material.** The items that should be scheduled follow the steps mentioned above. It is recommended that tentative dates for periodic meetings are set with team members. Visualization of this schedule using a gantt chart is effective. An example of such a gantt chart is shown below;

Example of a "Learner’s Guide Development Schedule"





## STEP-2 Assignment of team members

### (1) Necessary expertise

Learner's Guide development requires expertise in the subject matter areas, instructional design, writing and editing. In addition, someone who can do some administrative work as an assistant should be involved. The expected roles of each team member are outlined below.

- **Coordinator (Team Leader)** --- The Team Leader or Project Manager is expected to take overall responsibility for the process of developing the Learner's Guide. He/she does not need to hold all the expertise but needs to have basic knowledge on each expertise. **The most important expertise for him/her is instructional design.** Thus often the coordinator's role is taken by an instructional designer. In addition, project management expertise is also critical for the successful development of the guide.
- **Subject Matter Expert (SME)** ---The Subject Matter Expert is expected to provide content information as well as insights, current trends etc. related to the topics in the training material. **This expert must have subject expertise in the Civil Service context.** The number of SMEs can be more than one and from various backgrounds to enrich the contents of the material. When the training course covers wider areas, it would be necessary to engage the numbers of SMEs that would cover all the specific areas.
- **Instruction design expert (Instructional Designer)** --- An Instructional Designer is expected to design the content such that it is easy to understand, effective to retain its contents, and encouraging to learn, . **The flow or story of the content of the guide is designed by this expert.**
- **Writing expert (Writer)** --- It is expected that the contents is written in a skilful manner, with simple and clear sentences. **This work directly contributes to the quality of the Learner's Guide.**
- **Editing expert (Editor)** --- It is expected that all the chapters and sections would be proof read and edited. Usually the contents are written by different writers, and so **editing is important to make the whole content flow consistently.** This step could be outsource to some professional companies. However, these companies may be limited

in knowledge in the subject area and may not be in the position to thoroughly edit the contents.

- **Assistant (administrator)** --- There would be a lot of administrative work to support this phase of training material development. For instance, preparation of the necessary documents, issuing appointing letters, arranging series of meetings, making meeting minutes, circulating meeting minutes, payments, etc. Also gathering information for the content can be done by this person.

When this process is done by one person, basically all above mentioned roles are to be played by him/her.

## (2) Building up a team

In reality unfortunately, it is not possible to assign all the necessary experts as explained in the previous section. Thus the coordinator has to come up with relevant team members through maximum utilization of the expertise available. **Some sets of expertise can be provided by one person.** In general, persons with the expertise of editing and instructional design have the expertise of writers. Sometimes writers can play the role of instructional designers because simple logical writing skill is part of instructional design. Sometimes the subject matter expert can play the role of a writer. It is also possible for the coordinator to play the role of an instructional designer. **The editor's role should "not" be played by writers.** This is because editing should be carried out using a third person's eye in order to check the contents in an objective manner.

With the above consideration as a guide, the coordinator would have to identify candidates for the expertise required. **It is important for the coordinator to evaluate the capacity of each candidate and to estimate the work schedule and workload** when checking the availability of the candidates.

Finally the coordinator assigns the most suitable members to cover all the necessary expertise needed and forms a team. **It is essential that all the members should agree on and clearly understand their respective roles.** It is recommended that the coordinator arranges to issue official assignment letters to the team members from a higher authority so that members can easily adjust their schedule and work smoothly.

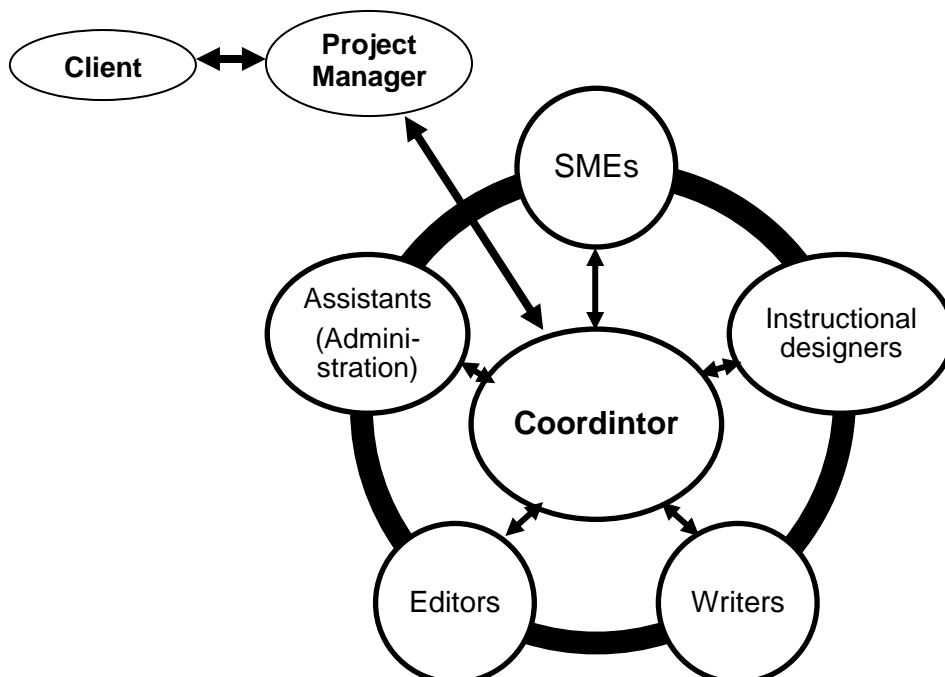
Examples of teams are shown below.

Example 1	
<u>Member</u>	<u>Roles</u>
Ms. A	Coordinator
Mr. B	SME-1
Mr. C	SME-2 and Writer-1
Ms. D	SME-3 and Instructional Designer
Ms. E	Writer-2 and Editor
Mr. F	Assistant

Example 2	
<u>Member</u>	<u>Roles</u>
<u>Ms. A</u>	Coordinator and Instructional Designer
<u>Mr. B</u>	SME-1 and Writer-1
<u>Mr. C</u>	SME-2, Writer-2
<u>Ms. D</u>	Assistant and Editor

### (3) Coordinating a team

**After forming a team, the coordinator would have to manage the team to facilitate communication among members for maximum performance.** The chart below illustrates the image of coordination. The coordinator is the bridge between the project manager and the team responsible for developing the Learner's Guide.





<Self-Check>

- All the roles of SME, instructional designer, writer, editor, assistant have been gathered.
- Each member clearly understands own role.
- Skill levels of each member in assigned role are sufficient .
- Schedule and workload have been agreed to by all the members.

### STEP-3: Developing story boards

Before starting to write the content, develop a curriculum including the story board of each section and agree on it with all the members. This step can be divided into 2 sub-steps below:

- (1) Reviewing TNA result and program design
- (2) Developing story boards

#### (1) Reviewing TNA result and program design

**It is important to review the results of the TNA and the program design with all members to ensure a well-coordinated and consistent strategy for the development of the Learner's Guide.** If the TNA has not been conducted, any research to reconfirm the intention of the training course can be sufficient. Consultations with the client could be a useful means of confirming the background for the proposed course.

Reviewing the program design, which includes the course objectives, duration, curriculum and any other information is also necessary. At least, the design should touch on the curriculum up to module level. The extent of detail presented can be on a case by case basis.

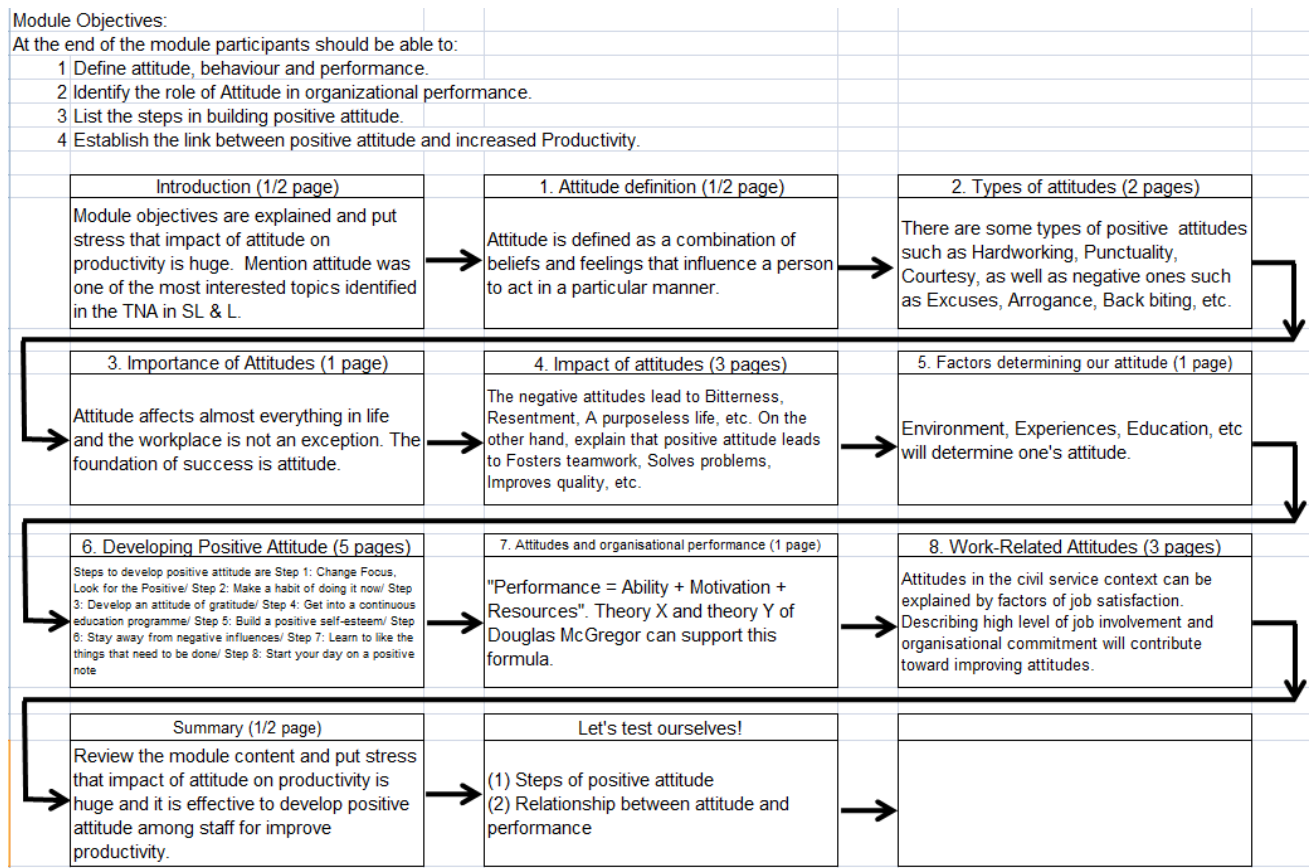
#### (2) Developing story boards

After reviewing previous phases, it is then time to develop story boards. **Story boards show how to explain the module and the topics in it. The story should be easy to follow and be understood, while ensuring effective learning. Collaboration between SMEs and instructional designers are critical for making good story boards.** The Instructional designer can contribute a lot to enrich the content by applying Andragogical models such as ARCS model and P-MARGE .

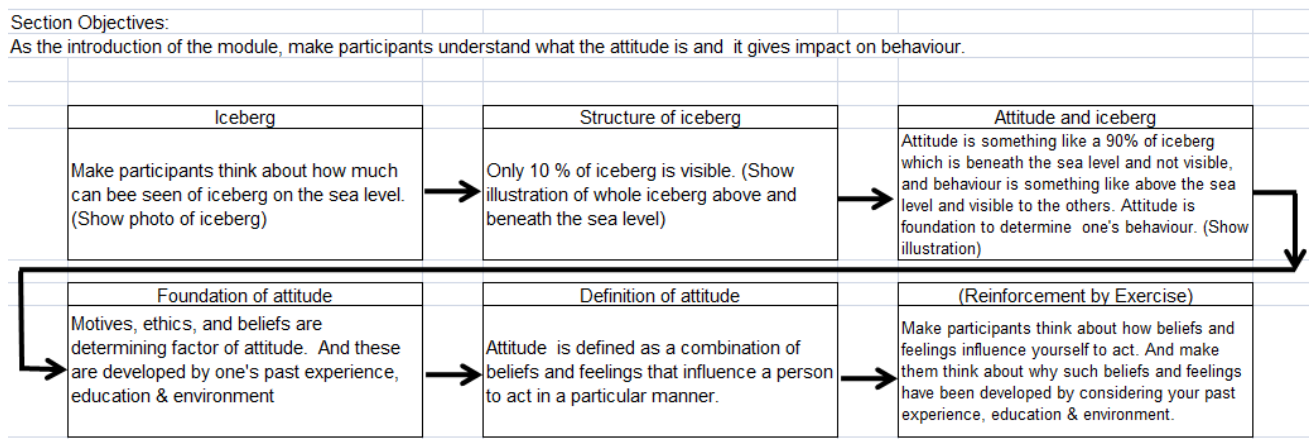
Story boards should include 1) title, 2) length (no. of pages), and 3) content outline and illustrate logical flow of the course. When the training material is long/heavy/thick, it is advisable to develop two levels of story boards namely; the module and section levels. The module level story board is a break down of a module into sections and the section level story board is a further break down of the section.

Some examples of story boards are shown below by taking the example of the “Ethical Leadership for Quality Productivity Improvement Course for Sierra Leone and Liberia” course,

**Example of a "Module Level Story Board"**  
**Module-2: "Attitudinal Change for Increased Productivity"**



**Example of a "Section Level Story Board"**  
**Section-1: "Attitude Definition"**



In this step, the critical role of the coordinator is to check if the story board is appropriate for the training objectives and target participants.



<Self-Check>

- [ ] TNA result and program design have been reviewed and objectives of training course has been clearly understood by all the members.
- [ ] SMEs and instructional designers have been effectively involved in developing story boards.
- [ ] ARCS model has been effectively applied in developing story boards.
- [ ] Story boards have been agreed to by all members.
- [ ] Story boards are attractive and easy to understand for target readers.
- [ ] Story boards are appropriate for training objectives and target participants

STEP-4 Developing a standard format

**It is better to agree on the standard format of the Learner’s Guide as far as possible before writing the contents.** When the content writing is done by several members, this decreases the editing burden in the later stages. A sample format of a few pages will help writers to share the image of the final output.

The items that should be standardized are as follows:

- Content structure
- Tense
- Active and passive voice
- Wording
- Use of technical terms
- Format of references
- Page layout
- Font size and type
- Use of bold, italic, capital, quotations, etc.
- Use of bullet points
- Use of photos, charts, tables, etc.
- File management rules
- Others





<Self-Check>

- Standard format was agreed by all members.
- Standard format is user friendly and easy to read.



Appendix 7-3: Sample of Standard Format of Learner's Guide

### STEP-5 Writing Contents

This step is conducted in 3 sub-steps below.

1. Agree on schedule
2. Take care of and monitor writers
3. Collect writings

Based on the story boards and standard format, which have been agreed on in the previous steps, writers would then write the contents of the Learner's Guide. **At the beginning of this step, it is important that all writers agree on a given schedule with the coordinator.**

The next step is conducted individually by the writers and progress is monitored by the coordinator. There are situations where an SME also plays the role of a writer. **Other writers would have to work closely with the SMEs and the coordinator would have to create a conducive environment for them to work together effectively. It is strongly recommended that monitoring meetings are held while the writers are writing.** These series of meetings is effective to ensure consistency in the contents of each writer. When it is difficult to organise such meetings, the coordinator should at least monitor each writer's content closely and coordinate among other writers to ensure quality. When one of the writers comes up with a problem, the coordinator should help him/her to solve it. This problem and solution should be shared with all writers so that they can head in the same direction. This coordination contributes toward reducing work involved in editing the Learner's Guide, which is the next step.

<Tips for good writing>

Instructional Design Models:

- ARCS Model --- Attention, Relevance, Confidence, and Satisfaction
- ETQ Model --- Experience, Theory, and Awareness
- 3C Model – Correct, Concise, and Clear

Concise sentence:

- Write concise sentences. A sentence should not contain unnecessary words. For example: “He wrote the biography of his life” should be written as “He wrote his biography”.

Clear sentence:

- Put the main point first ---When writing a sentence, the main point you are trying to put across should preferably be in the beginning. Good example: *“It was a beautiful garden with well-kept flower beds, immaculately trimmed hedges, and plenty of trees.”*

“It was a beautiful garden” is the main idea of your sentence, the rest is extra information.

Immediately upon reading the sentence, the reader knows what you are saying.

Paragraph:

- The first sentence of a paragraph should be a topic sentence, introducing the main idea of the paragraph.
- Arrange sentences in a logical order.
- Relate all sentences to each other.
- Form parallel grammatical structures.

Others:

- Use less uncertain expressions such as “I think”, “I feel”, “It seems that”, “I can be”, “Probably”, etc.
- Be careful to use trendy words and expressions which can disappear soon.



<Self-Check>

- [ ] All writers have agreed on story boards.
- [ ] Writers fully understood tips for good writing.
- [ ] Monitoring meetings have been organised while writers were writing
- [ ] Coordinator has been closely monitoring each writer and shares problems and solutions with all writers.

When the coordinator collects drafts from writers, the drafts should be read through. Details such as grammar, terminology, etc. can be checked by editors in the next step but the contents of the Learner's Guide should be well examined. Points for this assessment are listed below.

- **Are there any errors relating to logic?**
- **Are the contents appropriate for the target readers?**

When the coordinator identifies critical issues, these need to be solved in consultation with the writers before going into the next step.

#### STEP-6 Proof Reading and Editing

After collecting all the draft materials from writers, they need to go through the process of proof reading and editing to **check the contents, correct mistakes, and make improvements to suit the Learner's Guide**. This step is a really tough job because the editor must be meticulous. The main role of editors is to check and correct the following:

- Grammatical mistakes
- Consistency of all parts (especially when drafts were done by more than one writer)
- Unclear sentences and paragraphs (including logical errors)
- Matching headers and their contents
- Matching list of contents
- Page numbers
- Sequential numbers in list of contents
- Layout

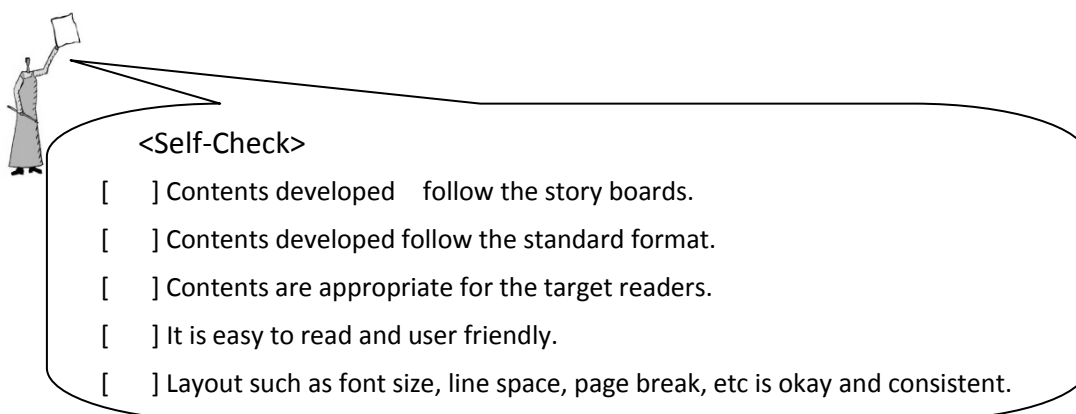
In terms of consistency, editors should check the following items below:

- Content structure
- Tense
- Active and passive voice
- Wording
- Usage of technical terms
- Format for references
- Page layout
- Font
- Use of bold, italic, capital, quotations, etc.
- Bullet point format
- Use of photos, charts, tables, etc.

These items are already determined in Step-3 (developing standard format of the manual). Editors would have to check the consistency of all these items and improve on them when necessary. When more than one writer is engaged, the editors' work would normally be heavy.

When editors find unclear sentences and paragraphs, these should be improved by rewriting them. **The role of editors is to check the contents with a third person's view point.** Since this step directly affects the quality of manuals, the coordinator should work closely with the editor and monitor the process. Where necessary, **the coordinator should coordinate with instructional designers, SMEs, and writers to discuss the issues in the editing work.**

After all the editing work has been completed, adjustment of the layout remains. The layout should be adjusted to make the manual reader friendly. Page breaks in particular should be checked to ensure smooth reading.



### STEP-7 Tabletop Review

After the first draft has been completed, all the members get together to **examine it by checking if there are any critical problems from various viewpoints such as the flow, logic, topics, layout design, etc..** At the point, the proof reading and editing would hopefully had been done so well that the check points proposed in STEP-6 will not be reviewed again. Come back to the course objectives and check the draft if it matches objectives.

### STEP-8 Piloting

The best way to make the draft perfect is to pilot it. **Conducting a pilot session using the draft Learner's Guide and getting feedback from participants is the best approach.** It is recommended that feedback is received from participants who were not directly involved in the development work. In instances where conducting a pilot session is difficult, other members of the team who would be using the draft materials could review the drafts. Feedback collected through piloting should be filtered and sorted out in order to pick up critical comments to act on.



<Self-Check>

- [ ] Contents are suitable to achieve the course objectives.
- [ ] Contents are appropriate for the target readers.
- [ ] It is easy to read, clear and user friendly.

### Step-9 Printing

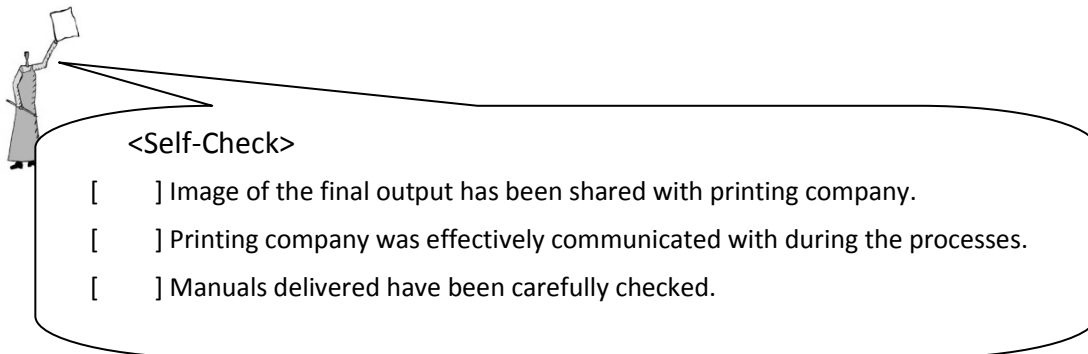
Printing is the last step of the process of development. Usually printing is done by a printing company. Thus communication with the company is critical. **The coordinator should clearly communicate with the printing company to convey ideas and share the image of the final output.** In order to shorten lead time, it is recommended that a very good printing company is selected and communicated with early enough before drafts are ready. When communication is done by an administrator, the coordinator should also closely monitor and follow up on the process.

The date of delivery should be set early enough before the use of the manuals. This is because it is often observed that delivery is later than the scheduled date and there needs to be adequate time to correct mistakes if they occur. In determining the number of books to be printed, the number of people who should receive completed versions in addition to the number of participants of the training course, should be taken into account.

At the point of giving out the soft copies of the Learner's Guide to the printing company, the following points should be communicated and agreed on with the company.

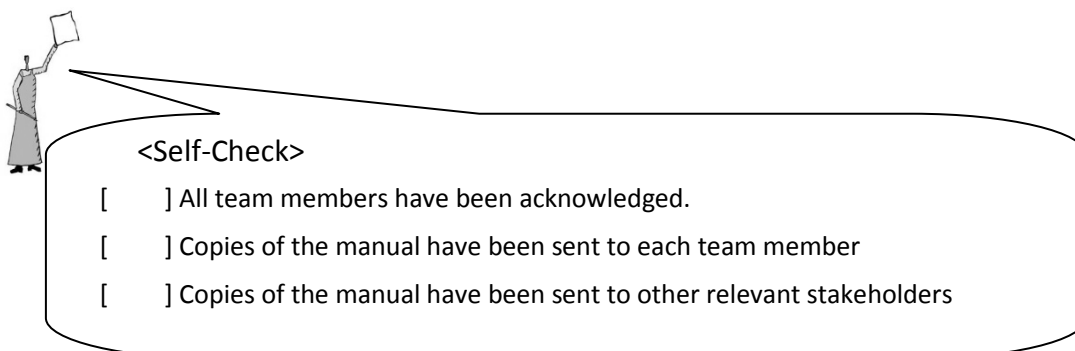
- Quality of printing (copy)
- Printing colour (for word, for photos, for charts and graph)
- Paper (colour, thickness, quality)
- Format of binding (perfect binding, ring binding, etc.)
- Designs of cover, flyleaf, spine.
- Date and time of handing out soft copies
- Date and time of delivery
- Number of books to deliver
- Cost
- Payment schedule

When the manuals are delivered from the printing company, the coordinator should carefully check and confirm that every instruction was fulfilled and there are no mistakes. The check points are the same as in the check list above.



### STEP-10 Acknowledgement

After completing the Learner's Guide, the coordinator should not forget to acknowledge the efforts and cooperation by team members and other people involved. **Send copies of the Learner's Guide to members if possible as a token to show appreciation. Sending out messages is also a good idea.** Team members are interested in the output of their work. Completed Learner's Guide are a reflection of their work and their contributions. Also this action is effective to maintain their interest and membership for working together again to revise and update the Learner's Guide in the future if it becomes necessary.



### 7.3 Effective PowerPoint Slides


---

Today PowerPoint is the de facto standard for presentation materials. However not many people can prepare effective PowerPoint slides. Some people prepare PowerPoint slides as presentation manuscripts and just read it. This can be boring.

**PowerPoint slides should only describe the points facilitators want to convey.** Do not write long sentences but short expressions and bullet points. **Introducing visuals makes slides attractive and effective.** Advantages of visualizations are summarized into 4 points below:

- Helps get attention from audience
- Promotes understanding
- Promotes retention of knowledge
- Saves time

Facilitators can visualize sessions in various ways such as showing movie clips and websites, drawing on whiteboard/flipchart, showing posters, showing actual products, and so forth in addition to PowerPoint slides.



<Example: Long sentences are not good>

Long sentences in a slide are not attractive for audience.

### INTRODUCTION


This manual provides facilitators, instructors, trainers of the Ethical Leadership for Quality Productivity Improvement Course for Liberia and Sierra Leone with fundamental training skills and know-how for course delivery. This manual consists of two parts namely, Part-1: Effective Training Techniques and Part-2: How to deliver "The Ethical Leadership for Quality Productivity Improvement Course".

The Part-1 explains basics of instructional design (ID) as effective techniques of training course delivery that are common to any training courses. This is especially important for beginner facilitators to obtain basic skills of preparing and facilitating sessions of the course. However, this is also effective for experienced facilitators because this part will enable them to review the experiences of facilitating in a systematic manner and improve their skills.

18

Getting attention

Use of clip art and photos can be effective in getting quick attention from participants. **Using nice clip art which is not related to slide content is not recommended.** It should be relevant and related to the content so that it will be effective.




<Example: Getting attention by clip art and photos>

Relevant clip art and nice photo are effective to obtain quick attention from audience


STEP-2 JUSTIFICATION OF TRAINING

**Analyze how to solve the gaps.**

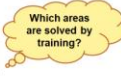
By system update?




By training?









Which areas are solved by training?






PERSONALITY IDENTIFICATION

12

Promoting understanding

**Visualize a concept by changing it into a chart or using a photo in order to facilitate understanding.** Good visualization helps audience understand topics being taught.

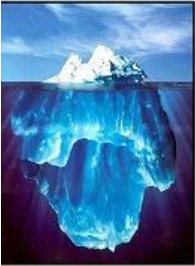
 <Example: Effective visuals>  
Explanatory visuals are effective to make things clear and easy to understand.

STEP-1 PERFORMANCE GAP IDENTIFICATION



ORGANIZATION

Real Situation  $\xleftrightarrow{\text{GAP Training Needs}}$  Ideal Situation

- Training needs are hidden in the gap.


 **THE ICEBERG**

ONLY 10% OF ANY ICEBERG IS VISIBLE. THE REMAINING 90% IS BELOW SEA LEVEL AND THIS FORMS THE BASE OR FOUNDATION.

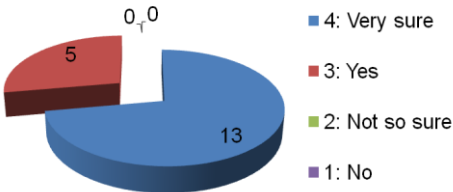
 

Promoting retention of knowledge

A graph is a typical example of visualization with the objective to promote knowledge retention. **Showing visual graphs instead of numbers, helps audience retain information in the form of a photographic memory.**

 <Example: Effective charts to retain information>  
By using the pie chart, the audience retains the message.

**Motivated to do Kaizen**




Motivation Level	Count
4: Very sure	13
3: Yes	5
2: Not so sure	0
1: No	0



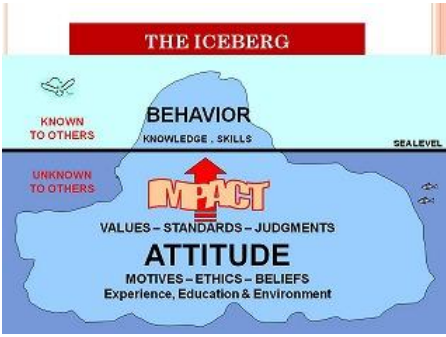
## Saving time

Sometimes it takes time to explain certain concepts such as processes. Long sentences are necessary to explain it. But **time can be saved by showing a chart.** Using the appropriate chart, can save time, facilitate understanding, and it will remain in participants' minds for a long time.



<Example: Effective visuals for clear information>

By showing visual, explanations can be easy and take shorter time.

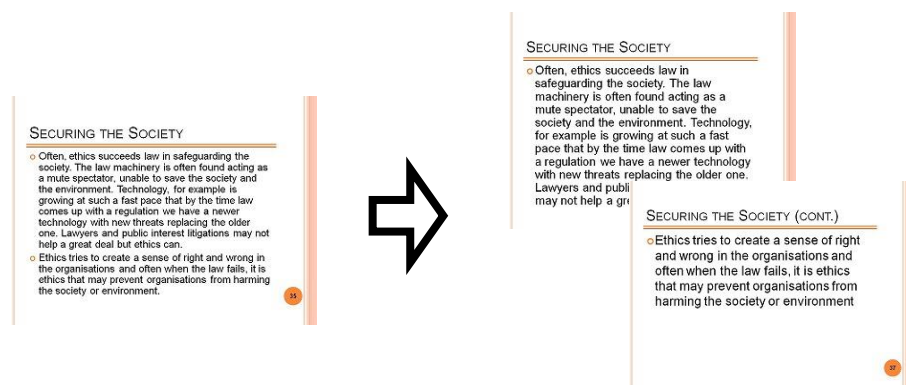


## 7.4 How to Develop Effective PowerPoint Slides

### A. Reduce small font letters

It is often found that slides are full of words with small font letters. Visibility is dependent on the classroom environment, light, projector, background and font colour, and so forth. However, **28 points can be a minimum font size** to read on screen comfortably in a classroom.

**Avoiding small letters on slides is the first step to improve the PowerPoint material.** When it is necessary to use long sentences, break them into some slides as shown below.



SECURING THE SOCIETY

- Often, ethics succeeds law in safeguarding the society. The law machinery is often found acting as a mute spectator, unable to save the society and the environment. Technology, for example is growing at such a fast pace that by the time law comes up with a regulation we have a newer technology with new threats replacing the older one. Lawyers and public interest litigations may not help a great deal but ethics can.
- Ethics tries to create a sense of right and wrong in the organisations and often when the law fails, it is ethics that may prevent organisations from harming the society or environment.

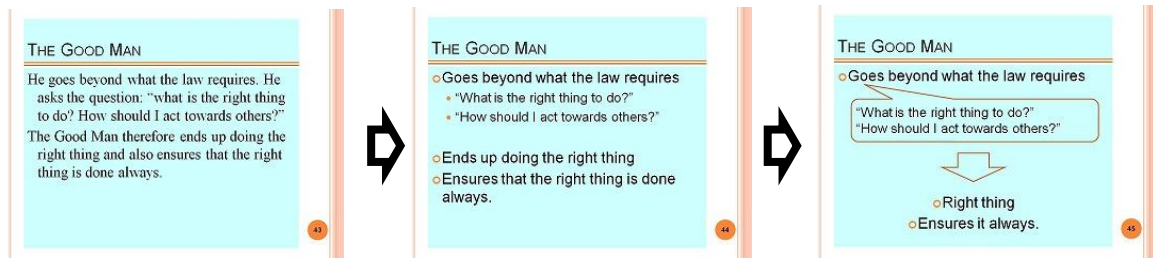
SECURING THE SOCIETY

- Often, ethics succeeds law in safeguarding the society. The law machinery is often found acting as a mute spectator, unable to save the society and the environment. Technology, for example is growing at such a fast pace that by the time law comes up with a regulation we have a newer technology with new threats replacing the older one. Lawyers and public interest litigations may not help a gr

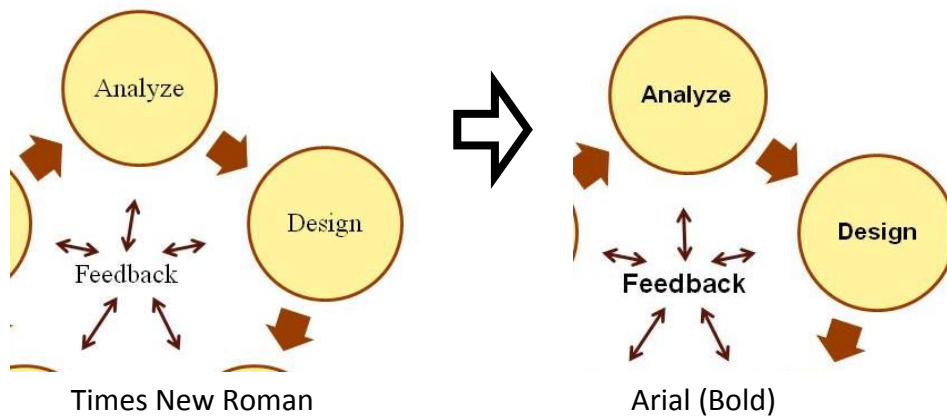
SECURING THE SOCIETY (CONT.)

- Ethics tries to create a sense of right and wrong in the organisations and often when the law fails, it is ethics that may prevent organisations from harming the society or environment

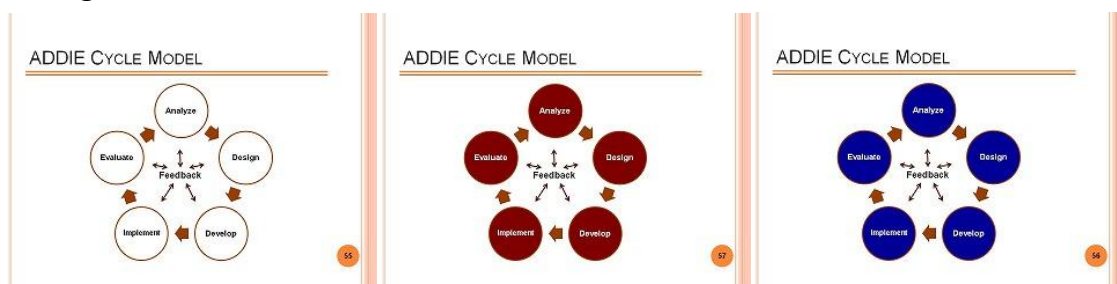
However, it is better to **avoid long sentences from the beginning**. The PowerPoint slide is a presentation visual aid, but it is not a manuscript for a facilitator to read. Thus, putting keywords to visualize a message is better. In addition, **using shapes makes it more effective** as shown in the example below.



To make slides more visible, it is recommended to **use a font type like Arial and bold**. The example below shows the difference.



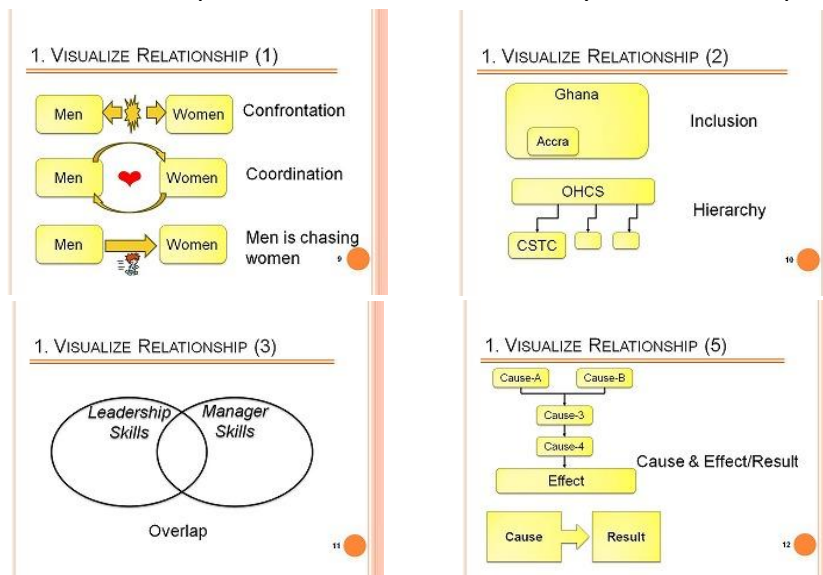
Care should be taken with the use of colour. **Some colours increase visibility of letters depending on the classroom environment.**



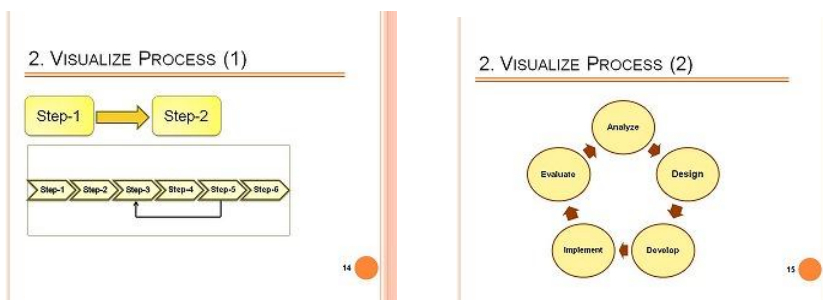
## **B. Visualize concepts**

Concepts can be visualized on PowerPoint slides to enhance understanding by audience and to promote and retain the concept for a longer period of time. Facilitators can save time to explain too. Visualizing concepts such as Relationship, Process, Structure, Framework, Important factor, Critical message, and etc. is effective.

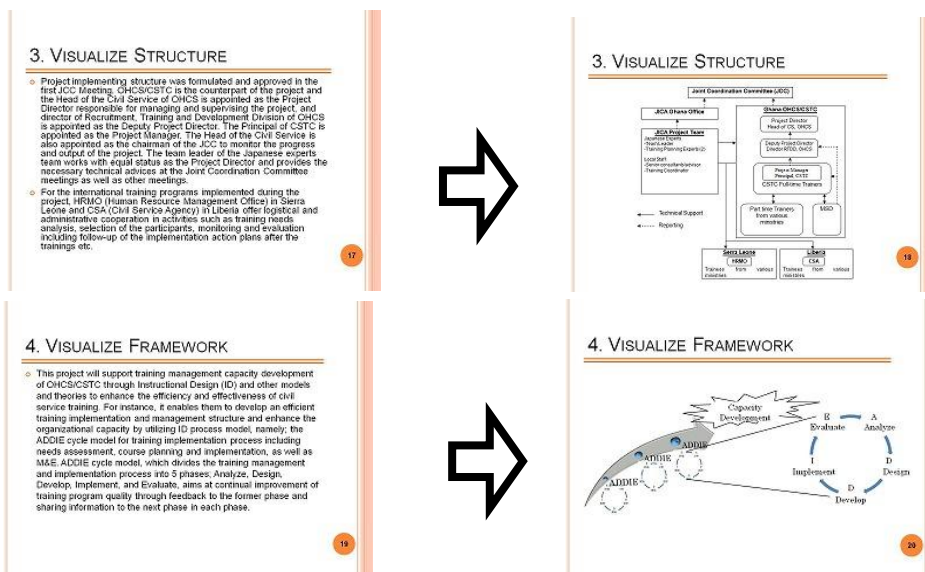
The concept of relationships can be visualized effectively in some examples below.



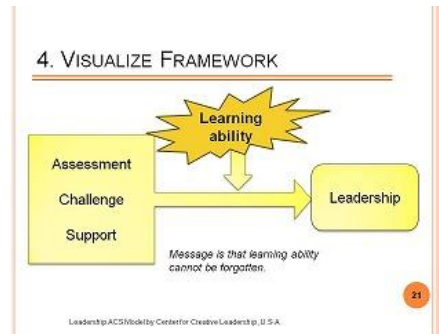
Processes are easy to be understood when it is visualized in examples below.



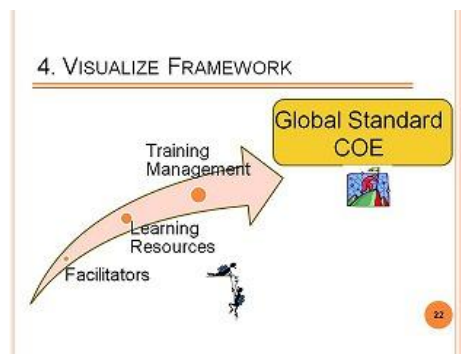
Structures and frameworks are easy to understand through visuals. For example, complicated structures which are difficult to explain with words can be visualized and easy to understand. Some examples are shown below.



**Emphasis on an important factor in a framework can be visualized effectively.** Below is an example that shows emphasis on Learning Ability as important for leadership development.


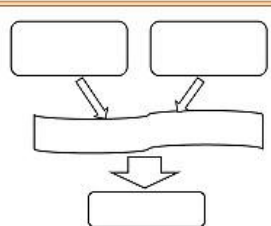



In other words, **visualization makes communication more effectively.** For example, you can visualize the critical message in the examples below that developing quality of facilitators, learning resources, and training management leads to a Global Standard for a Centre Of Excellence.

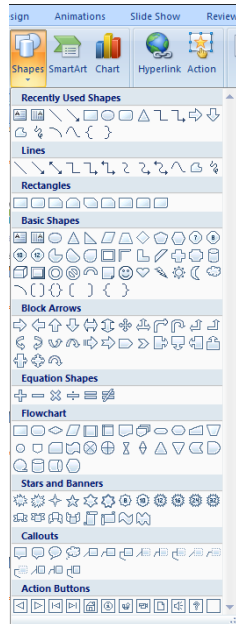


Here are steps for visualization of a concept to help facilitators. It can be done through 4 steps as indicated below.

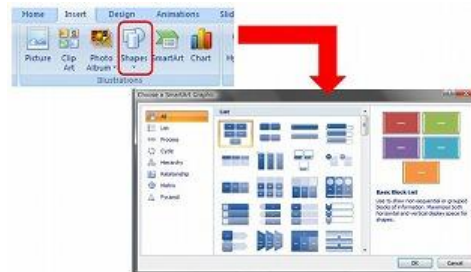
- Step-1: Pick up keywords**
- Step-2: Relate each keyword**
- Step-3: Design overall structure**
- Step-4: Put keywords**

<p><u>Step-1: Pick up keywords</u> from the sentence by underlining them as in the example.</p>	<p><b>STEP-1: PICK UP KEYWORDS</b></p> <p><b>The course</b> is developed based on the <b>needs of Civil Servants</b> identified in a <b>Training Needs Analysis</b> that was conducted in <b>Sierra Leone and Liberia</b>.</p> <p><small>Source: ORIENTATION BROCHURE of EL/QPI</small></p> <p>25</p>
<p><u>Step-2: Relate each keyword:</u> Pick up keywords on a paper and relate them to each other by using arrows, etc. as in example.</p>	<p><b>STEP-2: RELATE EACH KEYWORDS</b></p>  <p>26</p>
<p><u>Step-3: Design overall structure:</u> Create an overall structure in your mind first based on the previous step. Draw on a paper as in example shown.</p>	<p><b>STEP-3: DESIGN OVERALL STRUCTURE</b></p>  <p>27</p>
<p><u>Step-4: Put keywords:</u> Put keywords into each box and finalize by modifying structure. Result can be seen in example shown.</p>	<p><b>STEP-4: PUT KEYWORDS</b></p>  <p>28</p>

Using the “Shapes” and “SmartArt” function of PowerPoint is strongly recommended to make visualization easy and efficient.



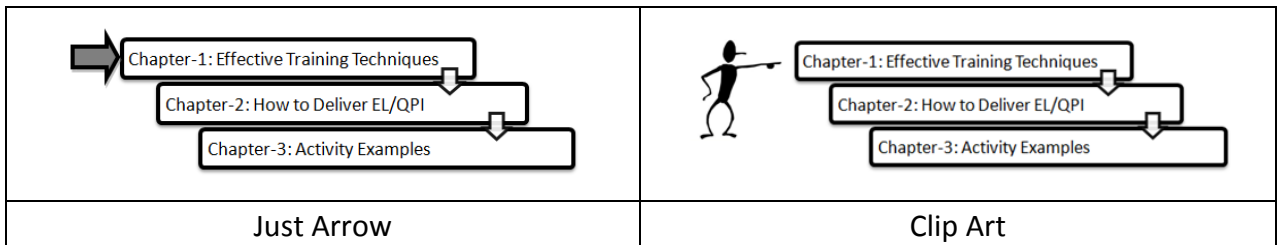
Insert -> Shapes



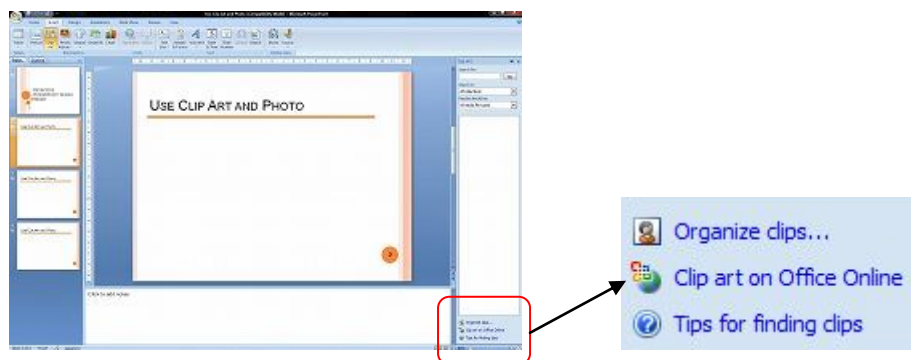
Insert -> SmartArt

### C. Use of clip art

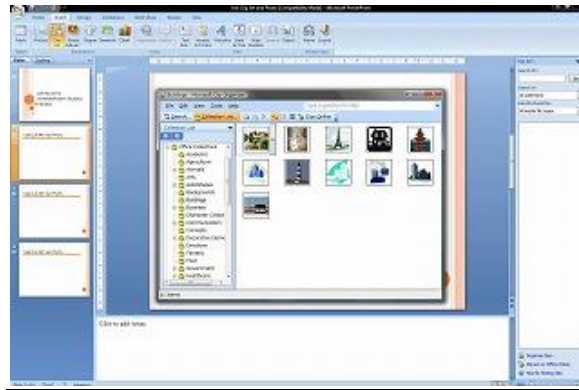
Showing clip art such as illustrations and photos are sometimes effective to draw the attention of the audience. For example, you can use clip art instead of an arrow as shown below. What is the difference in impact between the two?



**Be careful with copyrights.** Clip art should be copyright free. PowerPoint has a wonderful function of Clip Art, which is convenient to use and is copyright free. Various kinds of illustrations and photos are shown on a screen in a separate window by clicking “Insert” and “Clip Art” as indicated below.



Click “Organise Clip”, and another window appears. Organise your favourite clip arts as shown below. What will appear will depend on your computer configuration.



Clicking “Clip art on Office Online, can access Microsoft Office homepage to search for copyright free clip arts if your computer is connected to the internet. There are many clip arts stored that can be downloaded. Search by inputting keywords such as “teacher”, “point”, “caution”, etc. There is access to it through the URL below too.

<http://office.microsoft.com/en-us/images/>



In addition to various kinds of templates from URL below, most templates are also visual slides.  
<http://office.microsoft.com/en-us/templates/>

#### **D. ID Model applications**

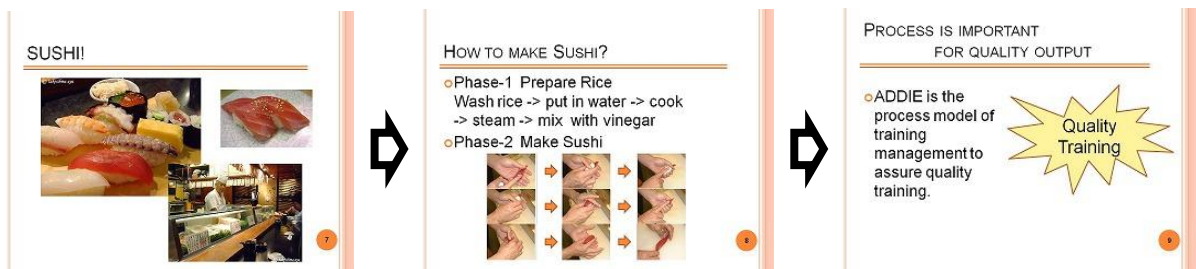
When presentation materials such as PowerPoint slides are being developed, **the story/scenario is more important than just making slides attractive in appearance.** Lesson plans indicate how facilitators proceed with sessions but this does not specify details.

For example, when a facilitator explains the importance of Time Management, he/she can choose from some options. He/she can begin using statements such as (1) “Time Management is very important”, or (2) “If you don’t care about time management, what happens?”, or (3) “Is time management really important?”, etc. Depending on the story/scenario, the slides will be different. In applying the “PIE Rule” (see 3.3 above), the story is made Practical by referring to

work place experience, Interactive by posing questions rather than just explaining, and Enjoyable by introducing an eating factor such as lunch. The slide can be something to ask participants about what will happen to their lunch if people do not care about time management in their workplaces. An example is shown below.



Here is another example. When facilitators explain the ADDIE Process<sup>5</sup> for example, they have some options than just explaining the concept of ADDIE Process. If facilitators apply two factors from the ARCS model (see 3.4 above), they will gain Attention in the beginning. It will be very attractive to show a process of making Sushi with beautiful photos. In addition, with the view point of Relevancy, facilitators must relate it to the ADDIE process. In this case, the slides can be on something to show photos of Sushi making process and how that process is important for the final output.



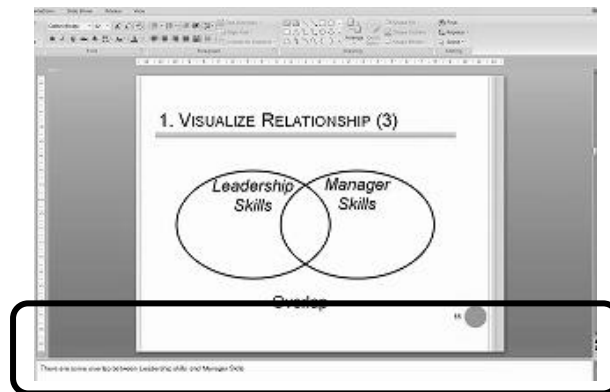
<sup>5</sup> ADDIE Process: Instructional design model that manage quality training processes. ADDIE stands for Analyze, Design, Develop, Implement and Evaluate.





<Example: Process of making effective PowerPoint slides>

Facilitator Mr. S has his own way of making PowerPoint slides. After he made a story/scenario of a session, he breaks it down into chunks of messages. Then he first puts each message into the note area of PowerPoint one after the other. After completing this process, he starts developing slides. He picks up key words from the note areas and puts them on the slide area by visualizing them one by one. This method makes him think effectively of what he wants to convey on each slide



## 7.5 Effective Support Materials

### Exercises/Activities

Exercises or activities are effective tools for learning. **These are effective in providing participants the experience to apply target knowledge, skill and attitude, and to increase their confidence and readiness..** Usually, exercises can be done after the explanation of the topic in order to practice it or to deepen understanding of it. **But it is also effective to conduct exercises first and then facilitate in such a way that brings out relevant points related to the topic.** Presenting the topics through exercises and generalizing it by applying the experiential learning approach is an effective way of using exercises. With this approach, the exercise should be well designed to meet the intended experience and to reflect it.


Exercises can be categorized into the categories below:

- Discussions
- Hands-on exercises
- Physical exercises
- Demonstrations
- Role Plays
- Case studies

The options available when using exercises include working at the individual level or in groups and getting participants to present the results of the exercises. The use of exercises is dependent on the domains of learning. **For knowledge, exercises contribute to retaining knowledge. For skills, exercises enable participants to apply knowledge and to practice. For attitude, exercises enable participants to have a feel of the topic under discussion.** Exercises enable participants to integrate KSA and facilitate their learning. The effectiveness of exercises impact on the achievement of objectives set for the session. In the skill focused session, exercises should be focused on using and demonstrating targeted skills. Exercises and case studies are the most important content for a skill-focused program. Thus, the course content should include them as much as possible.

(1) How to develop exercises/activities

There are many types of exercises such as quizzes, games, self-check, role play, demonstration, case study and so forth. **The simple way to develop exercises is to convert content to a quiz, game, or check list.** Exercises conducted in groups as a way of competition becomes a game. A typical example of a game is “Telephone Whispering”, in which one person whispers a message to another following a certain order. This game can be utilized in order to make participants experience that communication can easily be faulty. **Popular games can be utilized in many ways by modifying and setting different objectives .**



<Example: Quiz>

Here is an example of a quiz meant to retain knowledge of the ADDIE cycle model.

Fill the blanks below.

A for Analysis

D for Design

D for [            ]

I for Implementation

E for [            ]



<Example: Quiz>

In order to reinforce attitude toward change and create a consciousness concerning the mindset participants, self-checks could be utilized. After participants complete check sheets, feedback and reflection is important.

#### Mindset Check Sheet

Check Yes or No to below questions

- I am comfortable in an environment where every day is the same. [Y / N]
- I don't like to change the way I do my work. [Y / N]
- I sometimes feel bad when my boss proposes new things [Y / N]  
( additional questions could be added.....)

Total number of Yes: \_\_\_\_\_

It is not easy to create your own original exercise , but you can start by modifying an existing one. This becomes your own exercise.

Reference URLs for developing exercises.

- Trainers Activities  
<http://www.mtlearning.com/>
- Free Training Resources, Games, Role plays, Exercises & Downloads  
<http://www.skillsconverged.com/FreeDownload/tabid/258/Default.aspx>



Appendix 7-4: Activity Catalogue

## (2) How to develop case studies

There are many kinds of case studies. There are four types of case studies: illustrative (descriptive of events), exploratory (investigative), cumulative (collective information comparisons) and critical (examine particular subject with cause and effect outcomes). You should choose the appropriate type depending on what you want to achieve with the case study.

**Case studies consist of two part, namely, 1) Case story, and 2) Questions.** It is important to design questions as well. Long academic case studies such as Harvard

Business Cases require a lot of work on interviewing and data collection. An explanation of how to develop a simple and short case study is presented below;

**Steps to create a simple case study:**

**Step-1: Determine what the case is meant to achieve**

**Step-2: Review sample case studies that are similar in style and scope**

**Step-3: Choose a case site such as location, organization, company or individual who is dealing with issues of interest.**

**Step-4: Collect information by documentation, review and interviewing.**

**Step-5: Organise information collected and write the case.**

**Step-6: Develop questions that will lead participants to achieve the objectives of the case.**

**Step-7: Pilot it by asking third persons to check the content.**



<Example: Case study development>

The steps taken by Mr. S when he developed his original short case study on customer service are presented below.

**Step-1: Determine what will be achieved with the case**

As an introduction customer service orientation, Mr. S set the following objective: “to understand that customer’s viewpoints and officer’s view points can be different”.

**Step-2: Review sample case studies that are similar in style and scope**

Mr. S searched text materials for CSTC training courses and found some case studies on customer service but they are different from his intention. So he searched the Internet by using the key word “customer service case study” and found some case stories but many of them are for service industries such as restaurants and shops. However, by reading these cases, he pointed out that “understanding customer view point and feeling” is an important common element. Next, he added the key word “public service” but did not find any case. He also tried the key word “Public service case study”. However, he found project reports of public sector reform etc. After searching for some time, he decided that he would modify the cases he found to the public service context.

Finally, he picked up one similar case for a restaurant which was not short.

Step-3: Choose a case site such as location, organization, company or individual who is dealing with issues of interest.

In order to make the case study realistic, he made up his mind to select his familiar working environment, that is CSTC . He decided to take the location to be the reception of CSTC, that receives telephone calls for enquiries on participating in training courses.

Step-4: Collect information by documentation, review and interview.

In addition to his current knowledge, he interviewed the receptionist who takes care of telephone calls . He asked questions related to:

- Roles and responsibility.
- Steps taken when the receptionist receives a call
- Difficulties in the work

From this interview, Mr. S could indentify an interesting and difficult call. He gathered more information about this case.

Step-5: Organise information collected and write a case.

After collecting the information, Mr. S organised the data and created rough sketch of the story including the following:

- 1) Description of the job and how the receptionist receives a call from potential customer.
- 2) Description of the difficult call that was collected through the interview.

Step-6: Develop questions that will lead participants to the objectives of the case .

Mr. S developed two questions to help participants think about what the customer expected when he called and what was wrong in the response.

Step-7: Pilot it by asking third persons to check the content.

After completing the case, Mr. K asked his colleague to read it thoroughly for feedback and editorials. He asked two colleagues to answer the two questions to check if they would give the expected answers. By this check, he identified that one of the questions can be misleading so he fine-tuned it.

**Another simple way to create an effective case study is to apply metaphors and create metaphorical case. In order to make participants think about unfamiliar things, you can use an environment, which is more familiar to participants.**

For example, for a case study on Training Needs Analysis, which is not familiar to participants, you can use a metaphor similar to diagnosis by a doctor in a hospital, which is familiar to participants. The case explains what happened to the patient when the doctor made a mistake in diagnosis before starting treatment. By this case you can make participants aware of the fact that TNA is important before you design any program. This example is enclosed in Appendix 7-5: Case Study Samples, SAMPLE-4: Mini Case Study on

Training Needs Analysis.

**By changing questions, the same case could be utilized to meet other objectives.** It is also effective to use newspaper articles and to make participants discuss and come to certain conclusions. **Privacy and copyright should be respected and well taken care of.**



#### Appendix 7-5: Case Study Samples

#### Exercise Instructions

Instructions for exercises are important to effectively conduct them. When facilitators conduct an exercise, they need to create instructions and the forms to be used. Facilitators can instruct orally, however, **it is recommended to create an instruction material and forms so that it will be clearer for participants.** Providing a dummy would provide a clear image to participants of what is expected and helps to avoid misleading them.

You can include the information below in the exercise instruction.

- Objective
- Output image (Dummy)
- Steps
- Members (if it is group work)
- Time allocation
- Presentation instruction

#### Additional Information (Reference materials)

Additional information can be provided in the form of support material. The role of support materials is to provide information for participants to learn further after the session. **Facilitators can develop support materials in order to 1) provide detailed information on topics delivered and 2) provide related topics to topics delivered.** They include reference book list, reference URL list, copies of newspaper and magazine articles, training resources used in similar topic on training courses, etc. in addition to original materials they develop. New trends on topics and latest relevant news are especially attractive to participants and facilitate learning. **Additional information is appreciated especially when participants are varied in background and their wide varieties of needs are not fulfilled by the limited time of the session.** Support materials contribute towards increasing overall satisfaction.



<Example: Additional Information (Reference materials) >

There are many cases in which support materials are appreciated by participants.

Case-1: In the session of “Ethics and Gender”, you can prepare some copies of recent magazine stories and provide. They are real case stories. You can recommend to participants the need to further discuss the articles back in their hotel when you do not have enough time in the session.

Case-2: When you deliver the session on “Concept and Essence of Leadership”, you can search the Internet and pick up some good homepages that explain various leadership theories. This will be appreciated by the participants who are interested in such theories because they can learn independently.

Case-3: When you deliver the session on “Report writing”, you can prepare various types of reports for reference. Collect examples of actual reports from your files at work and modify them by removing private data and make them learning resources.

Case-4: Some participants are engaged in improving the quality of service as in-house consultants. They are very much interested in learning practical tools for improving their performance as consultants. However, majority of participants are general officers. In such a case, when you deliver the session on “Quality Improvement Tools”, you can prepare a material to explain tools that are not included in the Trainee’s Guide. There are many tools for quality improvement. The Trainee’s Guide only picks up some of them. Your additional material will be appreciated by in-house consultant participants and contribute to overall satisfaction.

## 7.6 Other Resources for Presentation

### Movie Clips

Seeing is believing. **Movie clips or videos are the best media to convey information.** People can maintain their concentration for longer periods when they watch movie clips. However, this is true only when the movie is well edited. A three-minute summary video of a football game is exciting and efficient to explain what happened in the game. However, if full length (not edited) video of a game is shown, it would take so much time. Editing movie clips is a tough work and requires professional skill. When you find a good movie clip, you can use it but be careful with copyright issues that could arise. **“You Tube”<sup>6</sup> can be one of the good resources of movie clips.**

<sup>6</sup> <http://www.youtube.com>

There are often many educational clips uploaded.



<Example: Effective usage of movie clip>

Facilitator Mrs. D utilizes a movie clip with music for the session on “Customer identification and customer care”. In the beginning, she shows a 90 seconds movie clip with high tempo music. This contributes to waking up participants. And after the video, Mrs. D asks participants “what did you see?” Usually, participants do not concentrate on the story so she plays the video a second time. Then she poses the same question. The story of the video is related to the session content. By this process, she can gradually go into the topic for the session with sufficient readiness of participants.



### Whiteboard/flipchart

Whiteboards and flipcharts are the traditional tools for teaching. These are still valid and effective when in use in the right way. As everyone uses PowerPoint today, sometimes hand writing and drawing can draw attention than electronic tools. **Facilitators can draw charts during presentation as well as write down points to catch participants’ attention and to promote retention of their knowledge.** The audience would be curious to know what the facilitator is going to draw and so would maintain their concentration on a presentation.

**The advantage of using the flipchart is that you can come back to any sheet when necessary.** On the other hand the disadvantage is the small size of the sheet. The advantage of using the whiteboard is that its big size allows facilitators to draw big charts. However, its disadvantage is that they need to erase when the space is not enough and they cannot refer to it later.

### Products

Showing actual products is the best way to explain things. **When facilitators show the actual product, participants will pay more attention to it than just explaining.** Facilitators can impact participants’ more and they retain the knowledge shared longer. For example, showing a book



facilitators want to recommend to participants in their hands can create more impact than just showing the information about the book such as title, author, publisher etc. on presentation material. However, when the product is large or dangerous, showing a movie clip or photo is an option.

### Website

If a computer is available and connected to the internet, showing websites is sometimes an effective way to visualize what is being said. **An advantage of showing websites is that it allows facilitators to be flexible.** When facilitators project any website on the screen in the classroom, they need to be careful enough such that everyone can clearly see and read.



<Self-Check>

Let's list up possible additional materials that can help to make your session more effective.



<Example: Group discussion instruction>

Below is a sample of support material to instruct an effective group discussion.

### Group Discussion Instruction

- Objective:  
This group discussion will make participants understand that there are varieties of approaches depending on the personality of subordinate.
- Output:  
A list of possible approaches of persons in negotiation process. Please write down approaches in a poster size paper (will be distributed in the class) of no more than 1 sheet.
- Steps and time allocation:  
Total 20 minutes  
Spte-1: Read the case individually (about 3 minutes)  
Step-2: Discuss first on personality of the subordinate. (about 5 minutes)  
Step-3: Discuss secondly on what approach will be effective. (about 10 minutes)  
Step-4: List up possible approaches.
- Members:  
(Instructed by a facilitator)
- Presentation instruction  
3 minutes for each group
  - ✓ 1 presenter will make a presentation on behalf of the group.
  - ✓ Presentation should include process of discussion and the result.

## 7.7 Summary

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This module has focused on how to make effective presentation materials and support materials. Visualization of presentation materials contributes to getting attention, promoting understanding and retention of knowledge. Visual presentation can be done using PowerPoint slides with visualized concepts and clip arts. Other resources such as movie clips, whiteboard/flipchart, actual products, website, and etc. can be utilized. In addition to presentation materials, support materials are important to make sessions effective. Support materials are activities such as exercises, case studies, exercise instructions and additional information. Original exercises and case studies could be created by modifying existing ones. The role of additional information is to provide detailed information on the topics delivered and provide information on related topics.

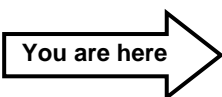


“Let’s improve your past PowerPoint slides”

Let’s revise and improve your PowerPoint presentation slides. Pick up some slides that contain a lot of words and which is difficult to understand. Apply the skills acquired in this module and improve your slides by reducing the number of words and applying visual concepts. After completing your work, share with other facilitators and ask for comments on the original and revised one.

## Module-8 Phase-4: Training Implementation --Training Delivery

Module-1	Human Resource Development (HRD) Framework
Module-2	ADDIE Process Model
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
Module-5	Phase-2: Training Programme Design –Curriculum Design
Module-6	Phase-2: Training Programme Design –Lesson Plan Development
Module-7	Phase-3: Training Resource Development
<b>Module-8</b>	<b>Phase-4: Training Implementation –Training Delivery</b>
Module-9	Phase-4 Training Implementation –Classroom Facilitation
Module-10	Phase-5: Training Evaluation



### Learning Point of This Module

In this module, the administrative aspect of training course implementation will be explained. Successful training programs cannot be achieved solely by facilitators. The module will explain that functions and roles needed during training implementation by touching on the facilitator's administrative role. It will also provide various tools for ensuring an effective implementation.

At the end of this module, **you will be able to**

- **Explain what is involved in effective training implementation**
- **Plan to create effective learning environments**
- **Plan to coordinate training courses effectively**

List of contents of this module:

- 8.1 Creating a Positive Learning Environment
- 8.2 Classroom Set Up
- 8.3 Check list for The Course Delivery Administration
- 8.4 Pre-Session Assignments
- 8.5 Summary

### 8.1 Creating a Positive Learning Environment

The learning environment refers to the soft and hard environment of the training centre including classrooms and supporting systems such as staff at the centre. Learning does not happen only in a classroom. Other learning support systems such as libraries, PC rooms, and support staff also impact on the training. When participants have problems to solve, accessibility

to supporting staff and their effectiveness affects their learning motivation. The course coordinator particularly plays an important role because he/she is the interface with participants. **Thus teamwork at the training institution is necessary.**

**The physical environment of classrooms has direct impact on the effectiveness of learning.** It is important to make the environment comfortable enough so that participants would not be disturbed and can concentrate on the session. Here are some factors to check in the classroom:

- Acoustic condition
- Noise
- Room lighting
- Sunshine
- Room temperature
- Flow of the air-condition air
- Utility space in the classroom
- Space on table for each participant
- Space between the participants
- Sitting postures on chairs
- Visibility of whiteboard and projector screen
- Eye contact between facilitator and participants
- Eye contact among participants

In instances where activities such as group exercises or discussions are included in a session, syndicate rooms of appropriate size and table arrangements different from the classroom setup. It must be planned in such a way that rearranging tables or moving to another room would not disturb the flow of the session. Finally **safety** (such as electricity, cables not entangled, anything sharp at the end, heavy thins to fall down, etc) **should be well considered in classrooms.** Effective class room set up will be explained in the next section.

**It is recommended that the role of the course coordinator is clearly defined for a smooth delivery process.**



<Self-Check>

Is a training coordinator assigned when you conduct training programs in your organization? If so, what are the expected roles?



Appendix 8-1: Terms of Reference (TOR) of Administrative Support Staff (EL/QPI)  
Appendix 8-2: Terms of Reference (TOR) of Course Coordinator (EL/QPI)

## 8.2 Classroom Set Up

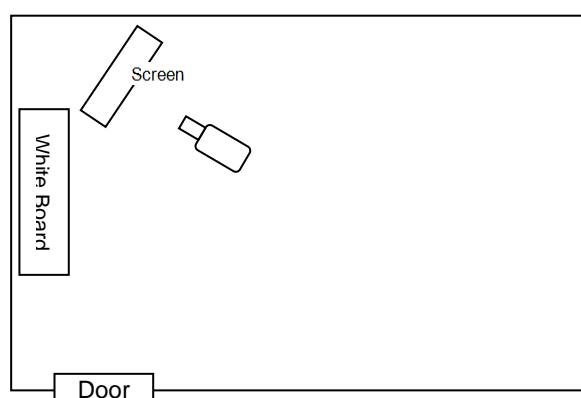
Physical classroom arrangement such as layout of tables, chairs, whiteboard, projector and screen is an important factor to make a session successful. **It will impact on the psychology of participants and influence the output of a session.** Do not forget that participants usually do not know each other and they can be nervous and sensitive in the beginning. Effective layout contributes towards increasing involvement of participants and this will lead to a better output.

### Entrance

It is recommended to arrange the classroom in such a way that **the entrance door is located at the back of the room so that people who come in late do not disturb the class.** This is also convenient for training coordinators who need to come in and out.

### Whiteboard, projector and screen

These should be in front or in the front corner of the classroom. **Be careful with the angle of the whiteboard and screen so that every participant can see clearly.** If the entrance door is located in front of classrooms, it is recommended to position equipment which attracts participants' attention such as flipchart at the opposite side of the door. Check reflections from windows and also from room lights. Lights will affect visibility of whiteboard and screen.

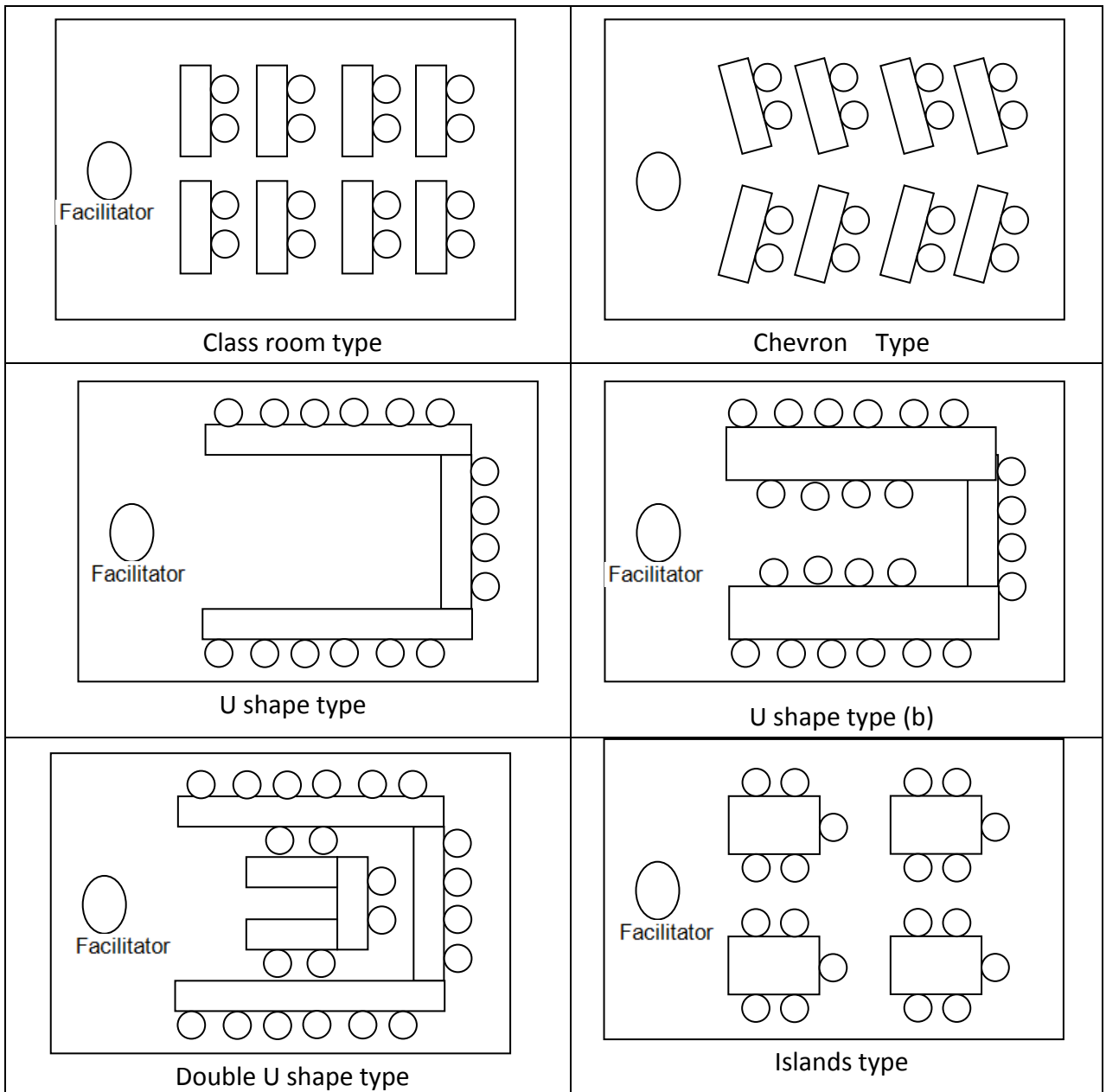


CSTC Lecture room

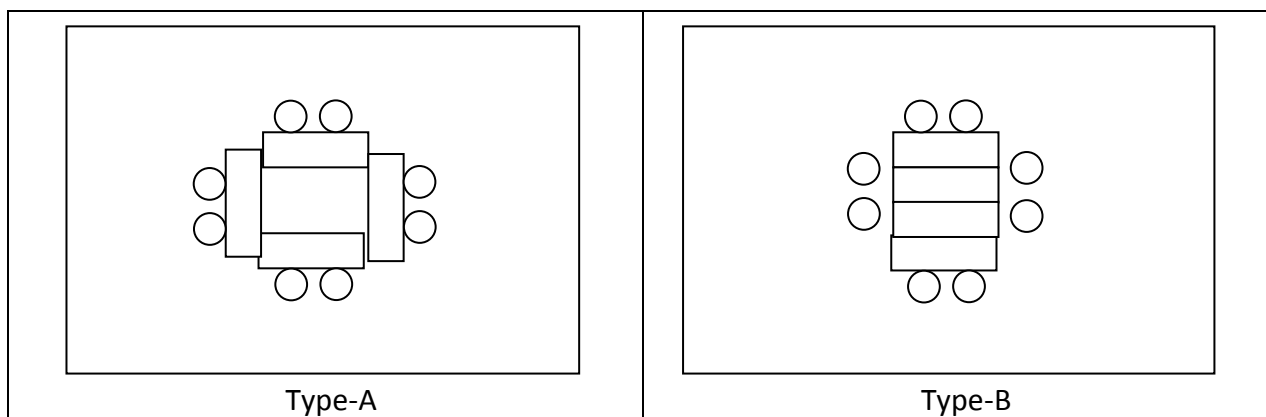
### Tables and chairs

Arrangement of tables and chairs is important because it affects participants' involvement. **Eye contact between facilitators and participants and among participants themselves should be considered when designing the setup.** When facilitators have better eye contact with participants, facilitators can involve them better. When participants have better eye contact with each other, they feel more responsibility and sense of unity. There are several standard types of classroom arrangements used in training such as **1) Classroom type, 2) Chevron type, 3) U shape type, 4) Double U shape type, and 5) Islands type.** If you think about eye contact, you understand that Chevron type is better than class room type in terms of eye contact among participants. The U shape arrangement is better than the Chevron type. The Island type is good for small group

work activities; however, this is effective even when group work is not conducted because participants at each table feel a sense of belongingness. The charts below show various types of classroom arrangements. You can try other forms of arrangements depending on the number of participants and the method of teaching.



Similarly, there are various types of set up for small group activities. Generally, it is necessary to have close contact among group members during group discussions or exercises. **It is effective to put tables and chairs closely together depending on the type of work and relationship among group members.** For example, during group discussions, the Type-A set up below can be comfortable for the participants. While, hands-on exercises like the “Bridge Building Exercise” would be require the Type-B set up to keep an appropriate working space.



### 8.3 Check List for The Course Delivery Administration

It should be noted that facilitators need to work with the course coordinator/organiser closely. Teamwork is one of the critical factors for successful trainings. From the preparation stage to the follow-up stage, facilitators should communicate closely with the coordinator, obtain and provide the necessary information. **Facilitators should clearly understand that their role is not only facilitating sessions but also fulfilling administration expectations in and out of the classroom.** Facilitators should follow instructions from the coordinator and do their best to make the training successful. The expected administrative demands from facilitators are listed below.

Before session:

- ✓ Preparation of lesson plan and handing it in by the dead line
- ✓ Preparation of materials and handing them in by the dead line

During session:

- ✓ Attendance check
- ✓ Time keeping
- ✓ Distribution of materials
- ✓ Operation of equipment in classroom such as PC and lights

After session:

- ✓ Writing monitoring feedback report and handing it in by the dead line
- Any other requirement specified by the coordinator

The role of the facilitator and the course coordinator could be different depending on the course. **It is recommended that the course organiser summarizes the instructions to facilitators and makes it available to them.**



Appendix 8-3: Session Preparation Check Sheet  
 Appendix 8-4: Classroom Check List  
 Appendix 8-5: Instructions for facilitators (EL/QPI)



## 8.4 Pre-Session Assignments

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### Session level assignments

**In order to maximize the session duration, an option is to give assignments prior to the session or after the session.** For example, the facilitator can provide a case study and instruct participants to read before the session so that reading time in the session can be eliminated and more time spent on discussions. It is even possible to instruct participants to read the case study and discuss in small groups. This enables the discussion in the class to start from a higher level. This assignment should be given at least one day earlier, considering participants' situation. In the case of international training courses, it is advisable not to task participants with any assignment on the first day of the programme as they would be acclimatizing to their new environment. The course coordinator and facilitator need to communicate to decide on this.

Here are some ideas for giving assignments:

- Reading materials such as case stories
- Reading materials and reflecting on certain questions
- Reading materials and holding discussions on certain questions in small groups
- Summarize current situation at the workplace related to the topics

On the other hand, **it is also effective to provide assignments at the end of sessions.** After each session, facilitators could ask participants to fill out forms to review their learning or to reflect on what they have learned. In instances where facilitators are unable to complete some parts of their sessions, they could ask participants to note these areas for further reading. **It is strongly recommended that the facilitator or coordinator collects completed assignments and provide feedback.** This is to ensure that participants take these assignments seriously.

Here are some ideas for post assignments:

- Summarizing lessons learned
- Relating lessons learned to current work
- Planning actions for workplace

### Course level assignments

**It is possible to integrate pre-assignments into the course design. In such cases, participants should be made to bring the assignments to the course.**

Sometimes assignments are given to be implemented once participants are back at the workplace. Implementing Action Plans is one of the tools used in post course monitoring of participants implementation of what they have learnt. However, it does not work sometimes when it is not closely monitored and followed up. Thus it is strongly recommended that this is built into the course framework to ensure maximum levels of implementation.

Course level assignments are the training organiser's decision to make. **Once it is built in the course, it should be well communicated to facilitators and coordinated** in such a way that each session is facilitated with this in mind.



<Example: Pre and Post Assignments for the EL/QPI Courses>

Pre-Training Evaluation is included in the EL/QPI course as a pre-assignment. Participants have to fill out the form by discussing with their bosses based on which a draft plan of actions to be implemented after the course is developed. The completed assignments should be sent to CSTC Ghana before the course starts. This system enables participants to be ready for learning during the course, ensures action plan implementation, and also provides background information to CSTC to guide facilitators in their sessions.

Action Planning is built in the EL/QPI as a post assignment. Participants are requested to implement action plans developed during the course once they are back to their workplaces. CSTC will monitor, follow up and conduct impact surveys to evaluate the impact of the training. Implementing the Action Plans is hard work but it ensures application of what they have learned and its impact on performance in the workplace.



Appendix 8-6: Pre-Training Evaluation Form (EL/QPI)  
Appendix 8-7: Action Plan Form (EL/QPI)

## 8.5 Summary

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A successful training is not made possible only by facilitators, but requires teamwork among all the staff in the training institution, involving course coordinators, administrators, supporting staff and so forth. The course coordinator is important as a bridge between participants and the training organisers.

The classroom environment is the most influential among the factors for learning. The layout should be arranged in such a way that participants can be comfortable and can concentrate on activities. A lot of effort goes into training delivery. The use of checklists and forms standardizes the work and makes it easy and smooth. The strategic inclusion of Pre and Post Assignments in sessions and in the overall course contributes to the effectiveness of the training.



“Let’s prepare for the training course”

Suppose you are a training manager who has the overall responsibility of 3 days training course for leadership topics. The programme has been designed, contents have been developed and external facilitators are assigned. About 30 participants from various ministries have been registered and course is just ready. Tomorrow, the course will start from 9:00 a.m. Two of your staff who has some experience of training coordination and administration are available to help you.

1. Please list up what you will check now in terms of the elements below.
  - Logistic arrangement of the course
  - Physical arrangement of the venue
  - Others
  
2. What roles do you assign to your staff for tomorrow.

## Module-9 Phase-4: Training Implementation --Classroom Facilitation

Module-1	Human Resource Development (HRD) Framework
Module-2	ADDIE Process Model
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
Module-5	Phase-2: Training Programme Design –Curriculum Design
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<b>Module-9</b>	<b>Phase-4 Training Implementation –Classroom Facilitation</b>
Module-10	Phase-5: Training Evaluation

You are here

### Learning Point of This Module

In this module, some tips for effective classroom facilitation on the day of the session will be explained. When you start your session, you should quickly assess your participants to reconfirm their background and level, and make yourself flexible. You should speak appropriately in terms of your tone and speed. In order to involve participants, you should learn some techniques for effective facilitation such as active listening and questioning. When you conduct your session based on your prepared lesson plan, these tips will help you to make your session more effective.

At the end of this module, **you will be able to**

- **List and explain 5 effective techniques of facilitations**
- **Facilitate session with effective icebreaking, energizers**
- **Facilitate session with utilizing effective facilitation techniques**
- **Identify competencies to be developed for an effective facilitator**

List of contents of this module:

- 9.1 Facilitation
- 9.2 Assessing Participants
- 9.3 Basic Presentation and Facilitation Skills
- 9.4 Maximizing Participation
- 9.5 Questioning Techniques
- 9.6 Effective Use of Icebreakers and Energizers
- 9.7 Effective Use of Exercises
- 9.8 Wrap Up

- 9.9 Tips for Facilitation
- 9.10 Competencies for Facilitators
- 9.11 Summary

## 9.1 Facilitation

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### What is Facilitation?

Weaver and Farrell (1999) see effective facilitation as helping people get their work done, whether it is done in a group, with a few people, or alone. It is about helping people work together more effectively. The facilitation process moves a general discussion to a more focused, goal-oriented one. It stimulates communication, encourages the examination of ideas and discussions and promotes participant involvement.

**The essence of the facilitator's function is that he or she stimulates actions and reactions from the participants during the communication process.** The facilitator's primary intent is to foster a full examination and discussion of group issues and promote participant involvement. The facilitator is seen by others to synthesize and often reword or rephrase participant comments. His or her fundamental technique is to navigate interactions through a network of cooperation, confrontation and compromise.

**Facilitators use their judgment as their predominant attribute, complemented with insight and seasoned abilities to cultivate unbiased and impartial environment for the group interaction process.** They normally work with a limited number of people. In general, the larger the more difficult it is to listen, regulate and synthesize meaningful interactions.

The key points of facilitation are listed below.

- Facilitation is about a process – how you do something; rather than the content – what you do.
- Facilitation is about movement – moving something from A to B. The facilitator guides the group toward a destination.
- The facilitator should always help groups to be clear about their tasks.
- Facilitators constantly ask themselves: “Is this action going to help the group complete its task?”

### The facilitation model

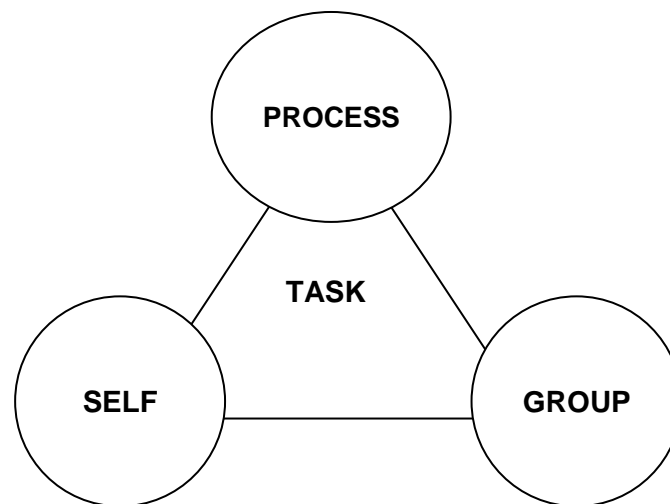
Weaver and Farrell (1999) suggest a facilitation model shown below. At the heart of the model the facilitator keeps in mind the task that the group is trying to get done. The task could be a new problem, challenge or opportunity facing the group. The next component in the model is the self. The facilitator interacts with the group. His or her presence directly influences the group dynamics. Therefore, the facilitator must be mindful of the fact that he or she is the instrument of facilitation.

The other component is about others. This component involves group dynamics. The facilitator must be aware of the interactions among the members of the group, and between the

group and himself or herself. The facilitator needs to balance the contributions and participation among the group members such that no one person dominates the group or imposes his or her view on the rest.

In order to achieve this balance, the facilitator relies on processes and tools. **The facilitator is mindful of the task at hand, that is, to guide the group from a new problem or challenge on to arriving at a decision point that is supported by members of the group.** The process the facilitators uses will involve divergent thinking and convergent thinking techniques. In divergent thinking, the facilitator draws out alternative views and opinions from the group. A diversity of views is strongly encouraged. From this diversity of views, the facilitator needs to guide the group to identify and select the most useful one to arrive at the desired destination.

The Facilitation Model is described in the chart below.



(Source: Adapted from Weaver, R.G. & Farrell, J.D., *Manager As Facilitators*, 1999))

## 9.2 Assessing Participants

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Facilitators need to know participants. Facilitators deliver sessions based on the preparation described in their lesson plans. However, **facilitators should be flexible to modify predetermined approaches and deal with various types of participants in appropriate ways to satisfy their expectations.** In the preparation process, facilitators need to check the participants' list to have a fair assessment of them. Robert W. Pike suggests in his book "Creative Training Techniques Handbook" that **facilitators should assess participants in terms of level of 1) knowledge, 2) interest, 3) language, and 4) influence.** Facilitators can assess these factors through conversations, asking questions, conducting pre-tests, and so forth.

It is recommended that the facilitator goes to the classroom early and to have casual conversations with participants before the session starts. When facilitators assess participants in the beginning of session, the typical way is to ask each participant to introduce him/herself briefly. Facilitators can also instruct participants to share their expectations from the training so that facilitators can understand their level of interest. Facilitators can determine their level of skill,

influence and their experience in their fields of expertise through these introductions. Depending on what the facilitator wants to assess, short questionnaires could also be used.

### Level of knowledge and skill

Facilitators should assess the level of knowledge and skill of participants on the topics they would be delivering. **This level can be identified with respect to their awareness level, competence level, and level of mastery.**

When facilitators find some participants who already have enough knowledge and skill on the subject area, facilitators can ask them to support through demonstrations in the classroom, etc.



<Example: How to deal with overqualified participants>

Facilitator, Mr. S found one of the participants of the instructional design session had knowledge and experience. The content of the session would not seem to be satisfactory to her. Thus Mr. S asked her to help him to share experiences and support participants to learn. She was happy to do that and contributed a lot by providing effective inputs.

### Level of interest

**Participants' level of interest can be identified in 4 levels namely; 1) Prisoner, 2) Vacationer, 3) Socializer, and 4) Learner.** The Prisoners are sent by their bosses and do not want to be there. They feel that attendance is a punishment. The Vacationers feel that attendance is a good way to escape from work. The Socializers are enjoying attendance as an opportunity to have a good time and meet people. The learners are there to gain new skills and knowledge.

In order to deal with participants other than learners, facilitators should catch their attention and explain how the session will be beneficial to them from the beginning. Remember P-MARGE of Andragogy (see 3.1 above).



<Self-Check>

Let's think of the percentage composition of 1) Prisoner, 2) Vacationer, 3) Socializer, and 4) Learner in your past training experiences.

### Level of language

Since facilitators are dealing with foreign participants from Liberia and Sierra Leone, **assessing their level of sophistication in English is important.** This should guide facilitators in selecting appropriate words to use. Avoid using jargons in training sessions.

### Level of influence

**Facilitators have to assess what kind of influence each participant has back in their workplaces.** Facilitators need to check participants' levels of authority to initiate new things such as implementation of their Action Plans. Based on this, facilitators could anticipate what kind of support they are likely to need in the application of what they learned. Facilitators should consider their levels of influence and take the appropriate approach.



<Example: Checking the level of interest of participants>

In the beginning of the session on “Sexual Harassment”, a facilitator poses the question “What is sexual harassment?” or “Where is the borderline with Sexual Harassment?” By listening to answers from participants, the facilitator can understand participants' level of knowledge and awareness of the topic.

Another example is about the session on “Quality Management”. The facilitator asks participants this question; “How much of your work can be improved by introducing quality management?” If you receive many negative responses, it means that participants do not have interest in the topic. You must start from increasing their level of interest.

## 9.3 Basic Presentation and Facilitation Skills

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### Speak with clear and loud voice with appropriate speed

The facilitators' voice is an important element in catching the attention of participants. **Facilitators should speak in clear and loud** voices so that every participant can hear them well. In addition, **it is effective to speak in an energetic and enthusiastic manner but not too fast.** If facilitators speak with a low and not clear voice, facilitators will lose participants' concentration and they may even think facilitators are not confident in what they are speaking about. Relax and start speaking slowly in the beginning, then you can increase your pace over time.





### <Self-Check>

Did you ever hear or watch your presentation recording? If not, you can just record your speaking voice for a minute and listen to it. Ask yourself if your tone and speed of voice is comfortable to listen to.

### Use both verbal and non-verbal language

When facilitators speak to participants, they use both verbal and non-verbal language. Use body actions, facial expressions, and so forth to show your intention. People tend to believe what they see rather than hear. **Using both verbal and non-verbal language will make your presentation more persuasive.**

### From wide to narrow

It is recommendable to **guide the discussion from a wide scope to narrow issues**. Facilitators should guide the discussion towards understanding the macro level picture based on which parts of this picture can be discussed to deepen the discussion and the learning points.

### Make participants think

It is very effective to ask questions occasionally. In order to catch the attention of participants, facilitators must make them think about the topics under discussion. Facilitators should not explain everything from the beginning to the end. But **facilitators should stop occasionally and pose questions to the class. Participants will start thinking and take ownership of the topics.** For example, facilitators can ask “Why do you think this happened?” before explaining it. If facilitators feel there is a risk that they will receive unexpected answers, they can immediately answer it themselves. This simple provision of questions is effective to also involve participants. Remember the 90/20/8 Rule.



### <Example: Changing pace of speech for effective facilitation>

Some facilitators speak in an energetic way and with a strong voice. It is true that participants are attracted by this and it increases their concentration. However, if the facilitator continues in the same manner throughout a session, participants get tired of the high tension in the classroom. They would need some rest. In this case, it would be necessary to introduce icebreakers such as group work. Remember Andragogy and the 90/20/8 rule. Even though the facilitation skill is high and the session is participatory, not changing tones will make participants tired easily. A good lesson plan is important.

## 9.4 Maximizing Participation

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In addition to providing information through presentations, **facilitators can involve the whole class by holding discussions and making them think, to deepen their understanding and to retain the knowledge being shared.** The facilitation skill for discussions (class and small groups) is one of the most important skills needed by facilitators to involve participants. Here are some tips for effective facilitation in discussion sessions.

### Attitude for facilitation

**There are three (3) types of attitudes required as a facilitator. These are 1) honesty and openness, 2) neutrality, and 3) objectivity.** First of all, facilitators should be honest and open to other opinions so that facilitators can gain trust from participants. With this attitude, the group will also become honest and open in discussions. This will enhance the discussions and contribute to deepening their understanding. The facilitators' attitude creates a strong influence than you would think. Secondly, facilitators need to be neutral to any ideas in the classroom. Thirdly, facilitators should be objective by monitoring the discussion and helping promote and deepen the discussion. Facilitators should not influence decision making of the group. This will decrease ownership of the decision or discussion.

### Introduction of facilitator

Facilitators must introduce themselves and explain their role when the session starts. This is important to establish trust between the class and the facilitator and is the starting point of involving the whole class in the session. **Avoid over reliance on yourself.**

### Explain the goal and objective

**Facilitators should make the goal and objective of the discussion clear to participants.** This way, the discussion will be focused on the issues and would be easy to come up with conclusions. This will contribute towards decreasing the frustration of participants.

### Encourage participants who do not speak

**The facilitator is to encourage all participants to speak.** Always pay attention and avoid the situation where only few participants control the discussion.

### Group Work

When you facilitate group work, carefully observe and provide assistance. Sometimes group members are frustrated because they cannot make progress. When you observe this kind of situation, **stimulate confidence and encourage them by providing appropriate words.** Sometimes you can recommend that the group takes a break to be refreshed.

## Active Listening

Facilitation is not a one-way communication to providing knowledge. Facilitators are in the position to support participants to learn. In order to support participants, facilitators should accept and understand them. This way, participants will accept the facilitator's support. **In order to make participants feel that they are accepted by facilitators, facilitators must listen to them carefully.** Here are some active listening techniques that help facilitators listen to participants effectively.

- **Pacing** --- **Speak the same way as participants.** When your participants speak slowly, you have to speak slowly. When your participants speak with anger, you also respond with a feeling of anger for participants to sympathize with the issues.
- **Repeating** --- **Repeat what participants say.** When any of your participants speak, repeat what he/she said in a short form using same words. This makes participants comfortable because they feel accepted. Even though, your opinion may be different from participants, first accept what he/she says by repeating. Discussions will then be smooth.
- **Non-verbal language** --- **Use non-verbal language when you listen.** Participants will feel that you are really listening.
- **Do not evaluate when you are listening.** --- **You should not evaluate if an opinion is good or bad.** Criticizing participants is the worst thing to do as a facilitator. When you do not evaluate opinions, participants will feel comfortable to provide their opinions and the group will be encouraged to go on.
- **Do not be afraid of silence** --- **After you pose a question, give enough time to participants to think about your question.** Sometimes, facilitators hurry to elaborate or answer too quickly. This will disturb participants. Some participants may be in deep thought. Waiting for about 10 seconds is a good strategy. Do not be afraid of silence.



<Example: Effective involvement of whole class>

A facilitator Mr. W often poses questions during his presentation. When someone responds, he always reacts by saying "Very good" or "That is an interesting opinion". By responding this way, the whole class is very much encouraged to speak up.

## Recording opinions

The facilitator should record opinions during the discussion and make them visible. Otherwise participants will discuss similar things again and miss some important opinions. Facilitators should

not take notes by writing whole sentences. **Facilitators can just write down points or key words so that they can come back to them.** When facilitators do not clearly understand what participants say, clarify with him/her. This will avoid misinterpretation and the participant will be satisfied that his/her opinions have been accepted as it is. This also promotes maximum participation in the session.

Some techniques for recording are listed below.

- Print in large letters, preferably in a combination of capitals and lower case (Tips: Use your whole arm when writing, which will make the letters larger.)'
- Use lighter colours for highlighting words or phrases;
- Use as few words as possible;
- Use bullet points or another indicator (dash, star, arrow, etc.) to indicate where each new idea begins;
- Do not crowd the page;
- Use paper with faint lines on it to help write straighter; and
- Stand to the side of the easel when writing.

## 9.5 Questioning Techniques

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### Questions for effective facilitation



Facilitators can control the discussion by asking questions. Asking **questions can motivate participants than just giving instructions.** There are two types of questions namely; 1) Open-ended and 2) Closed-ended questions. **Open-ended questions start with the 5W 1H concept.** The answers can be flexible. These types of questions are effective in making participants think about ideas, opinions, etc. **Closed-ended questions can be answered with “Yes” or “No”.** These types of questions are effective in controlling discussions to a certain direction or to confirm something. Here are some questioning techniques, which can encourage participants to keep on learning.

- **Asking about the future** --- Facilitators can encourage participants by asking about the future instead of asking about the past.
  - ✓ (Not good) What are the causes of failure?
  - ✓ (Good) How can you make it successful?
- **Positive questioning** --- When discussions becomes negative, facilitators can change the atmosphere by asking positive questions
  - ✓ (Not good) Why can't you do that?
  - ✓ (Good) How can you make it possible?
- **When participants rely on facilitators and ask for help by questioning them, facilitators can turn the question around to members.**
  - ✓ (Good) That is a good question. Let's ask other members.
- **Questioning to widen scope** --- When discussion stops without new development.

- ✓ (Good) What factors have influenced this happening?
- ✓ (Good) What is the reason behind this happening?
- ✓ (Good) Are there any different opinions?
- **Questions to sort out** --- During the discussion, facilitators sort out opinions from participants.
  - ✓ (Good) These opinions are similar. What do you think?
  - ✓ (Good) There are so many opinions. What are the common points?

### Questions that facilitate learning

Here are some questions that facilitate learning:

- At the start of the Processing/Analysis of contributions;
  - ✓ What impact or effect did that event have on you?
  - ✓ What are your reactions when X did it that way?
  - ✓ How did you account for that?
  - ✓ What does that mean for you?
  - ✓ How might it have been different?
  - ✓ Do you see something else operating there?
  - ✓ What does that suggest to you about yourself and your group?
  - ✓ What do you better understand about yourself and your group?
- From Processing to Generalizing:
  - ✓ What was our intention by that action?
  - ✓ Did you get the result?
  - ✓ What might we pull or draw from that?
  - ✓ What did you learn or re-learn?
  - ✓ Does that remind you of anything?
  - ✓ What principle or pattern do you see operating here?
  - ✓ What is the deeper theme?
  - ✓ How does this relate to other experiences in your work setting?
- Generalizing leads into applying
  - ✓ How could you apply or transfer that to your work setting?
  - ✓ What would you like to do with that?
  - ✓ What are the options?
  - ✓ What might you do to help yourself?
  - ✓ How could you make it better?
  - ✓ What are the consequences of doing or not doing that?

- Consolidating
  - ✓ How was this for you?
  - ✓ What were the pluses and minuses?
  - ✓ How might it have been more meaningful?
  - ✓ What changes would you make?
  - ✓ What would you start doing, stop doing, and continue doing?

## 9.6 Effective Use of Icebreakers and Energizers

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**Icebreakers and energizers are effective for involving participants and keeping their concentration during sessions.** They are usually conducted within short periods of time to help participants relax and to refresh themselves. Activities to refresh participants are valuable; however **they should be related to the topic being discussed to have maximum effect.** For example, when an energizer in the communication session is related to something about communication, it will refresh participants as well as deepen their understanding in the topic.

### Icebreakers

**The objective of icebreakers is to create an active and positive atmosphere in a classroom and to enable a smooth kick-start.** They are used at the beginning of sessions. It is especially necessary at the beginning of the very first session of a course or in an opening orientation. The purpose of the icebreakers is to deal with the anxiety felt by participants when they find themselves in new environments and with unfamiliar people. Successful icebreakers promote communication among participants and the facilitator and their readiness to learn. Icebreakers help:

- To get participants to feel comfortable
- To get participants to know each other
- To get participants to know the facilitator
- To get participants ready to learn
- To get participants to concentrate on the session

The types of icebreakers are listed below:

- Physical exercise
- Group exercise
- Story telling by facilitator
- Quiz
- Self-introduction on certain topics

One example of an icebreaker is to ask participants at the beginning of the session, to introduce themselves in order of their birthdays. This little idea could be very effective in promoting a positive environment for the session. The selection of icebreakers should be guided by the relationship among participants and the facilitator. Additionally, when the icebreaker is related to the subject area it contributes to the smooth start of the session.

You can check the appropriateness of icebreakers using the following guidelines.

- Time consumption
- Threat potential
- Possible group dissatisfaction
- Fun, excitement
- Creative quality
- Information about others
- Relaxation potential
- Ease of implementation

#### Do's and Don'ts

- Do it at the beginning of the programme.
- Be sensitive to age, cultural and gender differences.
- Remember the 4S – short, safe, simple and synergistic.
- Don't reinvent the wheel – innovate and modify.

#### Reference URLs

- Free Icebreakers  
<http://www.businesstrainingworks.com/Train-the-Trainer/Icebreakers-Free.html>
- 40 Ice Breakers  
<http://www.training-games.com/pdf/40FreeIceBreakers.pdf>
- Ice Breakers, Energizers, and Activities  
[http://humanresources.about.com/od/icebreakers/Ice\\_Breakers\\_Energizers\\_and\\_Activities.htm](http://humanresources.about.com/od/icebreakers/Ice_Breakers_Energizers_and_Activities.htm)
- Icebreakers and Introductions  
<http://www.reproline.jhu.edu/english/5tools/5icebreak/icebreak2.htm>
- Icebreakers, Warm-up, Review, and Motivator Activities  
<http://www.nwlink.com/~donclark/leader/icebreak.html>
- Top 10 Active Ice Breakers  
<http://adulthood.about.com/od/icebreakers/tp/toptenkinetic.htm>

#### Energizers

Energizers are conducted during the session, while icebreakers are usually at the beginning. **The objective of energizers is to refresh participants and to keep their concentration.** Thus the focus is more on refreshing than on promoting communication. According to the 90/20/8 rule, facilitators need to change their pace every 20 minutes. In instances where the same pace of presentation needs to continue more than 20 minutes, an energizer can be integrated. Also in changing the pace or an activity, an energizer is effective for a smooth transition. Energizers should contribute to deepening the understanding on the topics. **It is better to strategically relate the energizer to the subject content than just to do a physical exercise.**



<Example: Effective energizers for change management session>

A facilitator Mr. M sometimes conducts the energizer “Small fish & big fish” in the “Change Management” session. The step is below.

1. Facilitator instructs participants stand up
2. Facilitator instructs that participants will open arms to show big fish when they say “small fish”. And close arms to show small fish when they say “big fish”. Participants should take opposite action of what they say.
3. Facilitator starts from the end of table in order of seat.
4. When participant make mistake, that participant should sit down. And resume.
5. When most of participants sit down, facilitator will finish.

By this short exercise, Mr. M makes participants refresh and feel that changing something used to it is difficult.

#### Reference URLs.

- Free Training Resources, Games, Role plays, Exercises & Downloads  
<http://www.skillsconverged.com/FreeDownload/tabid/258/Default.aspx>
- Multiple Intelligences: Icebreakers and Energizers  
<http://www.managetrainlearn.com/page/multiple-intelligence-exercises>
- Icebreakers, Team Building Activities, and Energizers  
<http://www.lionsclubs.org/EN/common/pdfs/icebreakers.pdf>
- Training Guide and Techniques  
<http://unesdoc.unesco.org/images/0013/001356/135603e.pdf>
- Collection of Free Energizers  
<http://www.thetrainingworld.com/cgi-bin/library/jump.cgi?ID=12511>
- Energizers: a lot of sense in nonsense.  
<http://www.thetrainingworld.com/cgi-bin/library/jump.cgi?ID=12514>
- ICEBREAKERS & ENERGIZERS  
<http://www.thetrainingworld.com/cgi-bin/library/jump.cgi?ID=12513>



Appendix 9-1: List of Icebreakers  
Appendix 9-2: List of Energizers

## 9.7 Effective Use of Exercises

Exercises are effective to deepen the understand of participants on the topics and to obtain skills and attitudes. When exercise is included in a session, **reconfirm the role and objective of it and conduct it in such a way that participants will achieve the objective.** Facilitators should relate exercise and session objectives so that exercise can play an effective role.

Usually, exercises can be done after the explanation of the topic to practice it or to deepen understanding of it. **It is also effective to conduct exercises first and then facilitate in such a way that brings out relevant points related to the topic.** Presenting the topics through exercises and generalizing it by applying the experiential learning approach is an effective way of using exercises.



**At the end of the exercise, providing feedback is important.** It can be mutual feedback among members or from the facilitator. By reflecting on the exercise, participants can deepen their understanding and practice targeted skills.

## 9.8 Wrap up

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Wrap-up is an important element of facilitation. Facilitators should have good wrap up skills. **Wrap up can be conducted during or at the end of the session or day or week or whole course.** It allows participants to reflect on the session or course. **There are four objectives in wrap up sessions indicated below:**

- **Helps participants to reflect on what they learned.**
- **Helps participants to recall key messages and insights.**
- **Helps participants to consider the applications of the concepts in their workplaces**
- **Makes participants commit to next actions**

Sometimes the wrap-up is called Debrief, Recap, Reflection, Retrospection, Feedback, Q&A, Assignment, Grand Finale, Primacy, Recency, Consolidate, Focus, and Direction. **Wrap up can be conducted basically in four categories indicated below:**

- **Individual writing**
- **Individual thinking**
- **Group writing**
- **Group/pair speaking**

There are many ways to conduct a wrap up session. Here are some examples.

- Have students and facilitators note their comments and concerns throughout the session for wrap up. (This is a good suggestion for facilitators even if it isn't used for wrap up.)
- Make session feedback a part of the participants' independent study and start the session with feedback from the previous session.
- Ask the participants to keep a journal about ideas concerning how the group is functioning and periodically discuss their entries at wrap up or privately.



Appendix 9-3: Wrap Up Examples



< Example: Individual Reflection in the leadership training program >

This is an example of a reflection activity in the self-leadership type identification course in Japan. It requires participants to frequently reflect on their findings on their type of leadership during the session. They then integrate all the findings and conclusions into action plans for becoming better leaders. Each participant is provided with a “Learning Journal”, which is a blank notebook at the beginning of the course. The Facilitator instructs participants to take notes of any findings about themselves. Participants are instructed to take notes in two ways of expressions.

“I learned XXXXXXXX”

“I learned that I was XXXXXXXX”

During the session, facilitators sometimes give a few minutes to the class to open their notebook and to take notes.



## 9.9 Tips for Facilitation

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Here are some tips for effective facilitation.

### Why use a flip-chart?

- Encourages people to comment;
- Portable;
- Can be created on the spot;
- Focuses everyone on one spot in the room;
- Ensures that all ideas are captured;
- Objectifies the ideas (on the chart, the ideas are not associated with a specific person);
- Serves as references during future discussions or activities;
- Can be used to document the group’s actions and discussions; and
- Several sheets can be posted and viewed at once.

### How to capture ideas

- Use key words to capture an idea or thought;
- Use the speaker’s actual words (so the meaning is not changed);
- Check with speaker to be sure ideas are captured accurately;
- Capture all ideas, indicating duplicate ideas in some way;
- Use abbreviations to save time;
- Use symbols in place of words;
- Ask for help with spelling;

- Ask group to slow down if falling behind; and
- Include activities that allow participants to write on the charts.

### How to form small groups

- Put number from 1 to N, which the number you want to make to each participant.
- Instruct to hold arms and divide into two groups depending on whether right or left arm top.
- Form groups depending on the month of birth
- Form groups depending on the birth place
- Form groups depending on the height
- Form groups depending on the colour of cloth
- Form groups depending on the favourite food

### Best and Worst Facilitator Practices

Some of the **best** facilitator practices include:

- carefully assessing the needs of the members
- probing sensitively into people's feelings
- creating an open and trusting atmosphere
- helping people understand why they're there
- viewing yourself as servant of the group's needs
- making members the centre of attention
- speaking in simple and direct language
- working hard to stay neutral
- displaying energy and appropriate levels of assertiveness
- championing ideas not personally favoured
- treating all participants as equals
- staying flexible and ready to change direction if necessary
- making notes that reflect what participants mean
- listening intently to understand totally what is being said
- periodically summarizing a complex array of ideas so that they form a coherent summary
- knowing how to use a wide range of discussion tools
- making sure every session ends with clear steps for the next meeting
- ensuring that participants feel ownership for what has been achieved
- ending on a positive optimistic note

Some of the **worst things** that facilitators do include:

- remaining oblivious to what the group thinks or needs

- never checking group concerns
- not listening carefully to what's being said
- losing track of key ideas
- taking poor flip chart notes or change the meaning of what's said
- trying to be centre of attention
- getting defensive
- getting into personality battles
- putting down people
- unassertively managing conflicts
- letting a few people or the leader dominate
- never checking how the meeting is going
- being overly passive on process
- pushing ahead on an irrelevant agenda
- having no alternative approaches
- letting discussions get badly sidetracked
- let discussion ramble without proper closure
- not knowing when to stop
- being insensitive to cultural diversity issues
- using inappropriate humor

Tips for handling difficult participants

<b>What they do</b>	<b>What you would do</b>
Talks too Much	<ul style="list-style-type: none"> <li>● Thank him for his inputs, summarize and move on.</li> <li>● Invite others for their comments.</li> </ul>
Doesn't talk at all	<ul style="list-style-type: none"> <li>● Do not assume he is not interested or bored. Test Assumptions. Draw the person out by asking him directly (i.e. calling his name) for his comments.</li> <li>● Alternatively, introduce group discussions and observe his participation rate.</li> </ul>
Definitely wrong	<ul style="list-style-type: none"> <li>● Do not belittle his response.</li> <li>● Comment by saying "That's interesting. How did you arrive at that conclusion?"</li> </ul>
Hostile	<ul style="list-style-type: none"> <li>● Maintain your composure. Do not take it personally.</li> <li>● Seek Clarification. Suggest you take the issue with him "off-line".</li> <li>● Do not let him push his agenda over yours.</li> </ul>
Side conversations	<ul style="list-style-type: none"> <li>● Move closer to the persons, i.e. using body language as a Hint for them to stop talking.</li> <li>● Alternatively, ask if everything is ok with them.</li> </ul>

Mobile phone Conversations	<ul style="list-style-type: none"> <li>• Establish ground rules at the start of the workshop.</li> <li>• If they need to answer a call, suggest that they do it outside classroom.</li> </ul>
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## 9.10 Competencies for Facilitators

**Facilitators should be competent in four areas, namely 1) Self-management and Awareness, 2) Communication and Human Relations, 3) Leadership, 4) Subject-Matter Knowledge, and 5) Facilitation Skills.**

### Competency Area 1: Self Management and Awareness

The facilitator is comfortable with his or her background and experienced and is capable of training and coaching new facilitators. He or she;

- Is aware of his or her own strengths and weaknesses;
- Seeks help, opinions, and advice from others when needed;
- Is aware of his or her own needs in a training/consulting relationship. Approaches issues with an open mind;
- Is not insecure when others express a different opinion; Encourages other perspectives and questions;
- Is open to learning from others in the groups he or she works with; manages his or her own time and work load effectively; and is willing to take risks for the sake of positive change.

### Competency Area 2: Communication and Human Relations

Effective facilitators are able to communicate openly and fairly with a variety of people. They apply facilitation skills when communicating one-on-one or in groups. The competent facilitator also:

- Treats people with respect;
- Is capable of working through miscommunication and conflict toward a productive outcome;
- Strives to accurately understand other's needs, values, and opinions.
- Works to keep communication channels open (e.g.' returns phone calls promptly, keeps others informed, even when difficulties arise, etc.); and
- Listens attentively regardless of feelings toward the speaker.

### Competency Area 3: Leadership

The competent facilitator:

- Comfortably takes initiative and leadership when appropriate; Successfully solicits the

- cooperation and commitment of others;
- Builds relationships and credibility before seeking alliances; Encourages others to take the lead when appropriate;
- Operates effectively within organisations; and
- Understands how to accomplish things in a particular organisational culture.

#### Competency Area 4: Subject-Matter Knowledge

The facilitator has a good understanding of facilitation, the role of a facilitator, and the application of facilitation in groups and organisations. He or she also:

- Knows the basic premises behind facilitation and can explain the benefits of facilitation to others;
- Demonstrates ability to facilitate meetings and workshops successfully;
- Keeps up-to-date on resources and literature about facilitation;
- Strives continually to learn about facilitation, facilitator methods, and the application of facilitation in a variety of situations; and
- Understands the differences among presenting, teaching and facilitating and can explain them to others.

#### Competency Area 5: Facilitation Skills

The facilitator demonstrates the ability to use a variety of facilitation skills and methods when working with groups and is able to guide groups to productive outcomes. Specifically, he or she:

- Draws out and balances participation;
- Uses recording techniques to record “group memory” and uses it to help the group be productive;
- Understands consensus and knows various methods for helping a group reach consensus;
- Is skilled at designing results-oriented, interactive meetings;
- Is competent at coordinating pre- and post-meeting logistics and administration;
- Demonstrates ability to facilitate a productive meeting : manages time well, deals effectively with latecomers, keeps the group focused, help the group reach closure, records ideas and decisions, etc.;
- Keeps the group focused on its meeting objectives;
- Helps the group stay focused by paraphrasing clarifying and summarizing;
- Opens and closes a meeting effectively;
- Uses appropriate activities, tools and methods during the meeting to help the group be productive;
- “Reads the group” and adjusts meeting activities accordingly;
- Listens well and summarizes people’s inputs and/or group discussions;

- Uses questions effectively to foster creative direct discussions, and to reach closure;
- Regularly seeks feedback from meeting participants;
- Adjusts and improves facilitations based on feedback.
- Has a basic understanding of group dynamics and how people typically react in group situations.

(Source: Fran Rees, “Facilitator Excellence”, 1998)

The core facilitation skills that a facilitator should possess can be summarized into the points below.

- Verbal skills (open questions, summarizing, probes, redirecting)
- Non-verbal skills (listening, body language, silence, eye contact)
- Recording skills (capturing and organising inputs on a flip chart)
- Remaining Neutral
- Guiding the process, not the content
- Balancing participation.

These skills are shown in the table below:

Verbal Skills	Non-Verbal skills
<ul style="list-style-type: none"> <li>● Asking questions</li> <li>● Probing</li> <li>● Paraphrasing</li> <li>● Redirecting questions and comments</li> <li>● Referencing back</li> <li>● Giving positive reinforcement</li> <li>● Including quieter member</li> <li>● Encouraging divergent views</li> <li>● Shifting perspective</li> <li>● Summarizing</li> <li>● Bridging</li> </ul>	<ul style="list-style-type: none"> <li>● Active listening</li> <li>● Voice</li> <li>● Eye contact</li> <li>● Facial expressions</li> <li>● Silence</li> <li>● Body language</li> <li>● Position and movement in the room</li> <li>● Distracting habits</li> <li>● Enthusiasm</li> <li>● Attire</li> </ul>

## 9.11 Summary

In this module, facilitators learned how to make sessions more effective by focusing on delivery in the classroom. At the beginning of sessions, facilitators need to assess participants in terms of 1) knowledge, 2) interest, 3) language, and 4) influence, and reconfirm the appropriate strategy to use. During the presentation, facilitators should speak in a clear and loud voice with an appropriate speed. Use both verbal and non-verbal language. Facilitators also learned some facilitation tips such as honesty and openness, neutrality, and objective attitudes, encouragement of participants who do not speak, active listening and effective questioning. Active listening skill includes pacing, repeating, non-verbal language, not evaluating when listening, and not being afraid of silence. Effective questioning skill includes asking about the future, positive questioning such as,

turning the question around to members, questioning to widen scope, etc. Also icebreakers and energizers are effective to keep the concentration of participants. Competencies needed for facilitators are 1) Self-management and Awareness, 2) Communication and Human Relations, 3) Leadership, 4) Subject-Matter Knowledge, and 5) Facilitation Skills.





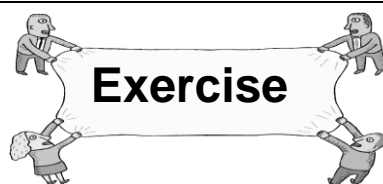
“Let’s practice how to make presentations”

Let’s have a role play exercise.

Form a pair and present your favourite content as a facilitator to your counterpart for about 5 minutes. The counterpart plays the role of a participant and asks questions etc. After your presentation, you can ask your counterpart to provide feedback. Then change roles and do the same thing. Before you make a presentation, pick up some aspects of facilitation skills that you want to sharpen from list below. The counterpart should play his/her role in such a way that the facilitator can achieve this objective.

Focus areas can be:

- Speaking with a clear and loud voice with appropriate speed
- Using both verbal and non-verbal language
- Making participants think
- Attitude for facilitation (honest and open, neutral, and objective)
- Introduction of facilitator
- Explaining the goal and objective
- Explaining whole picture and then narrowing down
- Encouraging participants who do not speak
- Active listening
- Questioning
- Recording opinions from participants



“Let’s evaluate the facilitation!”

Let’s find the opportunity to evaluate our facilitation by using the checklist below. This checklist can serve us a guide in the preparations to facilitate your session. Also, it could be used by another person with whom you have agreed in advance to give you feedback on your presentation. After the facilitation, you can spend time together to review your performance.

	Evaluation Item	Scoring (1 -10)	Remark
<b>A. Ensured the Learning Objective of the Courses/Session</b>			
1.	Learning Objectives are shared clearly at the beginning of the session		
2.	Learning points were summarized and achievements of the learning objectives were confirmed before the end of the session.		
3.	Practical examples relevant to the context of civil service in the region were utilized.		
4.	Connection of the session to the action plan was clearly guided.		
<b>B. Effective Lesson structure and well planned use of time</b>			
5.	The session was started and ended within planned time.		
6.	All the planned learning points were covered.		
7.	Instruction Modes are changed at least once in 30 minutes.		
8.	Group/Pair/ individual exercise was added at least once in a session.		
9.	Presentation by the participants was added at least once in a session		
10.	Energizers were added at least once in a session.		
<b>C. Speech technique</b>			
11.	Speed of speech was appropriate		
12.	Voice level and tones were appropriate		
13.	Responded to participants in acknowledging and encouraging manner		
<b>D. Effective use of Training Material/ Training aids</b>			
14.	Font size of the PowerPoint material was big enough		
15.	PowerPoint material were attractive and effective for facilitating participants’ understanding/memorizing. (Use of relevant photos, diagram etc. were observed)		
16.	Relevant additional material (Case, exercise, article etc.) were provided and utilized effectively		
17.	Effective use of Flipchart, whiteboard, stickers etc. were observed.		

## Module-10 Phase-5: Training Evaluation

Module-1	Human Resource Development (HRD) Framework
Module-2	ADDIE Process Model
Module-3	Phase-1: Training Needs Analysis (TNA)
Module-4	Instructional Design Basics
Module-5	Phase-2: Training Programme Design –Curriculum Design
Module-6	Phase-2: Training Programme Design –Lesson Plan Development
Module-7	Phase-3: Training Resource Development
Module-8	Phase-4: Training Implementation –Training Delivery
Module-9	Phase-4 Training Implementation –Classroom Facilitation
<b>Module-10</b>	<b>Phase-5: Training Evaluation</b>

You are here

### Learning Point of This Module

In this module, training evaluation is discussed. Evaluation is a very important process for quality improvement. Evaluation is usually done by the organiser and facilitators should also share in its objective and methods and contribute to an effective evaluation especially in terms of assessing participants' learning. The Four levels of evaluation model is applied is explained and applied in this module. Also actual examples of evaluation activities and assessment tools for EL/QPI Course are occasionally refereed and how to develop tools are explained.

At the end of this module, **you will be able to**

- **Explain the process and methods of evaluation**
- **Explain the role of facilitators in training evaluation**
- **Explain how evaluation contributes to quality improvement**
- **Develop Assessment tools for training evaluation**

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## 10.1 Objectives of Evaluation

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**The objective of evaluation for facilitators is to obtain feedback for improving the quality of session. For the organiser, the objectives are to compile information for improving the whole course in terms of design and way of coordinating.** Also each phase of ADDIE processes should be reviewed based on the feedback.

Evaluation is not simply picking up weak points of facilitators or grading them. The organiser should clearly communicate to facilitators that evaluation is utilized for identifying what can be improved for the sake of achieving the training quality desired. Facilitators should consider the evaluation process as a constructive function.

**The key questions asked in this phase are;**

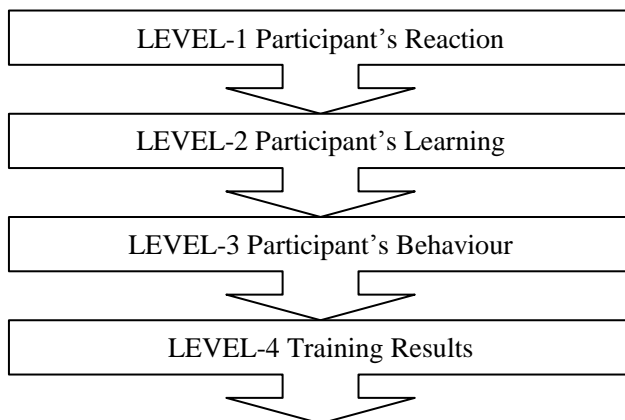
- **To what extent has the course objectives been achieved?**
- **To what extent has the problem identified been solved by the training?**
- **What should be improved in subsequent training courses?**

## 10.2 Evaluation Methods

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### Four Levels of evaluation

Evaluation is to be done in the four levels indicated below



Level-1 and 2 can be evaluated right after the training course in classroom, while Level-3 and 4 can be evaluated in participants' work places over a period of time. Thus these levels can be interpreted as steps in chronological order.

Level-1: Reaction --- The first step to be done in the evaluation is to check participants' reaction. This can be conducted during or right after the programme. It is to evaluate **participants' impressions, feelings, satisfaction levels, etc.** Interview and questionnaire can be used as a tool.

Level-2: Learning --- Second step is to evaluate what extent has **participants learned in terms of KSA.** This can be identified by comparing before and after the training.

Test, questionnaire can be used as a tool.

Level-3: Behaviour --- The third step is to evaluate what extent has **participants' behaviour changed**. This can be evaluated at their workplaces. It is to evaluate how much training gave impact on participants' performances in real situations. Self-check, interview, questionnaire, observation can be used as a tool.

Level-4: Result --- The last step is to evaluate what extent has **training given impact on workplace as a final output**. It should make clear profit to the workplace such as increase of sales, productivity and so forth including intangible benefit. It should be evaluated some time after the training. Data analysis, interview, questionnaire can be used as a tool.

### Timing of evaluation

Evaluation can be categorized into 4 in the view point of timing as below.

- Pre-course evaluation
- In-course evaluation
- End-course evaluation
- Impact survey

Pre-course evaluation --- It evaluates participants' performances before the training for the sake of comparing the performances after the training. This also contributes to provide participants' current levels to facilitators.

In-course evaluation --- It evaluate level 1 and 2 during the course. This contributes to on-going modification and brings the course to right track. It can be conducted every day or one time during the course as mid-term evaluation.

End-course evaluation --- It evaluate level 1 and 2 right after the course. Usually it is conducted at the last day of the course.

Impact Survey --- It evaluate level 3 and 4 at some time after the course. For Level 4 evaluation, it should be more than three months. However, when duration is getting long, it becomes difficult to relate result identified and training.



<Self-Check>

Let's check what evaluations are conducted in the training programs in your organization.



<Example: Effective involvement of whole class>

EL/QPI Course for Sierra Leone and Liberia applies four levels of evaluation with readiness evaluation as indicated in the table below.

Evaluation Levels	CSTC's Evaluation Steps	Institutions in charge	Evaluation Objectives	M&E Tools
Readiness (Level 0)	Step 1: Pre-Course Evaluation	CSTC HRMO/CSA	To identify the expectations of participants and to promote the preparation of participants towards the course	Pre-Course Action Plan
Reaction (Level 1)	Step 2: In-Course Evaluation Step 3: End-Course Evaluation	CSTC/MSD CSTC/MSD	To assess participants' satisfaction on courses and relevance of courses to the needs of participants	Observation/dialogue Questionnaire
Learning (Level 2)	Step 2: In-Course Evaluation Step 3: End-Course Evaluation	CSTC/MSD CSTC/MSD	To assess whether participants have improved their KSA through the course	Observation/dialogue Questionnaire Comparison of Pre-course and End-Course Action Plans
Behaviour (Level 3)	Step 4: Impact Survey	CSTC/MSD HRMO/CSA	To assess whether participants continue to utilize the KSA learned in the course and whether their work performance has improved after the course	Questionnaire Interview (with participants and their supervisors, colleagues) Observation at work place
Result (Level 4)	Step 4: Impact Survey	CSTC/MSD HRMO/CSA	To assess whether the institutions that send participants to the course benefit from the training course	Questionnaire Interview (with participants and their supervisors, colleagues) Observation at work place

### Target of evaluation

After all steps of evaluation, all the information will be analyzed and evaluate training course in the elements indicated below.

- **Quality of Programme Design**
- **Quality of learning resources**
- **Quality of training delivery** (facilitators' performance, learning environment (hardware and software), etc.)

Finally, evaluation result should be utilized for improving quality of above mentioned elements. This is most important process because objective of evaluation is to improve training course for future. When necessary, you should come back to TNA phase and reconfirm the training needs.

### 10.3 How to Evaluate Participants' Readiness (Level-0)

Readiness Evaluation is conducted before the course implementation. **The purpose of Readiness Evaluation is to identify the expectation of participants and to promote the**

**preparation of participants towards the course.** This level of evaluation can be conducted through the Pre-Course Evaluation. The evaluation results are shared in the facilitators' meeting or related meeting and utilized by facilitators to modify the sessions to suit participants' levels and interests.

**The key questions to be asked in this step are below.**

- **What do the participants expect of the course?**
- **What is the current level of KSA of the participants?**



<Example: Pre-Course Evaluation in the EL/QPI Course>

In the EL/QPI Course, Pre-Course Evaluation Form is used. Steps are indicated as below.

- 1) Distribute the Pre-Course Evaluation Form through Human Resource Management Office (HRMO) and Civil Service Agency (CSA) at the time of nomination. Candidates are requested to fill the form for application.
- 2) The Course Coordinator reviews the form and identifies the interests of participants and current KSA (Pre-Course Evaluation).
- 3) The Course Coordinator shares the findings at the facilitators meeting or related meetings
- 4) Facilitators reconsider their facilitation based on the evaluation results to suit the needs of participants.

#### 10.4 How to Evaluate Participants' Reaction (Level-1)

Reaction Evaluation is conducted during and at the end of the course (In-Course Evaluation and End-Course Evaluation). **The purpose of Reaction evaluation is to assess participants' satisfaction on courses and relevance of courses to the needs of participants.** The evaluation results are shared at the course facilitators' meeting or related meeting which is held within a month after the course to discuss how to improve the next course

**The key questions to be asked in this step are below.**

- **Are the participants satisfied with the course?**
- **How relevant is the course to the participants' needs, considering their work and responsibilities?**

Information for evaluation can be gathered in some ways as indicated below.

- Class discussion
- Focus group interview
- Individual interview

- Questionnaire

Method	Advantages	Disadvantages
Class discussion	<ul style="list-style-type: none"> <li>• Effective to obtain general idea.</li> <li>• Two way communication</li> <li>• Can validate the answers.</li> </ul>	<ul style="list-style-type: none"> <li>• Some participants do not contribute.</li> <li>• Difficult to sort personal opinions and general opinions.</li> <li>• Facilitation affects discussion</li> </ul>
Focus group interview	<ul style="list-style-type: none"> <li>• Effective to obtain ideas on specific areas.</li> <li>• Can validate the answers.</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult to sort personal opinions and group opinions.</li> <li>• Facilitation affects discussion</li> </ul>
Individual interview	<ul style="list-style-type: none"> <li>• Effective to obtain detail information.</li> <li>• Can validate the answers.</li> </ul>	<ul style="list-style-type: none"> <li>• Some people hesitate to provide honest feedback.</li> <li>• Interviewer affects discussion</li> <li>• Take time</li> </ul>
Questionnaire	<ul style="list-style-type: none"> <li>• Less time for conduction</li> <li>• Effective to obtain information equally from all the participants.</li> <li>• Effective to obtain quantitative data.</li> </ul>	<ul style="list-style-type: none"> <li>• Difficult to develop</li> <li>• Difficult to obtain detail information.</li> <li>• Difficult to interpret and validate the answers gathered.</li> </ul>

### Class Evaluation Meeting

This meeting is facilitated by facilitator with all the participants at one time. Facilitator should be a neutral person otherwise, participants will not express honest opinions sometimes. Starting from asking general impression on the programme and continue on prepared questions. When facilitator finds any areas that should be pay attention, lead the discussion and obtain necessary information.

Since this is two way communications, **facilitator can clarify opinions and gather right information.** Also it can serve as the opportunity to give message from organiser side and discuss future improvement and so forth.

### Focus Group Evaluation Interview

This meeting is facilitated by facilitator with a group ranging 5 to 10 participants. Compare with larger number of group, **easy to lead the discussion so that effective to withdraw information by focusing on some areas.** For example, when you want to gather feedback from the participants especially on some aspects of learner's workbook, you can lead the discussion by focus on that points and dig in to gather desired information. Disadvantage is that result would be influenced by the facilitator's facilitation. It is important to facilitate the interview without any bias.

### Individual interview

This is for gathering detail feedback such as deep insights. **It is more effective if you identify background of participants and interview in the intended areas.** For example, when you find a participant with rich experience in managing a company, you can interview him/her in the topic of leadership in the training course. Interview would provide precious advice for improvement.



Disadvantage is that it takes time.

### Questionnaire

This is popular method to gather information. It takes less time. However, it takes time to develop for the first time. **Its strength is to obtain quantitative data from all the participants equally so that it contributes a lot to objective and statistical analysis.** When comments are gathered, often there is no opportunity to clarify them. Thus interpretation of qualitative information would be difficult and sometimes misleading.

**Best way is to combine questionnaire and some ways of interview.** Gather quantitative data by questionnaire and dig in some specific areas by interviewing would provide effective information and easy to analyze.



<Example: In-course and end-course Evaluation in the EL/QPI Course>

In the EL/QPI course, evaluation for reaction is conducted using the in-course evaluation and end-course evaluation. The steps are indicated below.

- 1) The Course Coordinator and a staff from MSD of Ghana **observe the delivery of** all modules and **interview** several participants to hear their reaction (In-Course Evaluation).
- 2) At the end of each session, distribute **the In-Course Evaluation Questionnaires** (See Appendix 9-1) to participants and collect them to assess the contents of the sessions and the quality of facilitation (In-Course Evaluation).
- 3) At the end of each session, the Course Coordinator holds a discussion with the facilitator of the session about the session to prepare **the Facilitator Report** (See Appendix 9-3) (In-Course Evaluation)
- 4) At the end of the course, distribute **the End-Course Evaluation questionnaire** (See Appendix 9-2) and collect them to assess the overall course contents and administration (End-Course Evaluation).
- 5) Within 2 weeks after the course, the course coordinator and the administrative support staff **analyze the observations, interviews and questionnaire results** (In-course Evaluation and End-Course Evaluation).
- 6) Within a month after the course, hold a **facilitators' meeting** or related meeting to share the results of the In-Course and End-Course Evaluation.
- 7) Before implementing the next course, CSTC holds an internal meeting to review the evaluation results and comments from facilitators to identify the actions to be taken to improve the next course.



Appendix 10-1: In-Course Evaluation Questionnaire (EL/QPI)  
Appendix 10-2: End-Course Evaluation Questionnaire (EL/QPI)

## 10.5 How to Evaluate Participants' Learning (level-2)

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Learning Evaluation is conducted during and at the end of the course (In-Course Evaluation and End-Course Evaluation). **The purpose of the Learning Evaluation is to assess whether participants have improved their KSA through the course.** The evaluation results are shared at the facilitators meeting or related meeting which is held within a month after the course implementation to discuss how to improve the next course implementation.

**The key questions to be asked in this step are below.**

- **What Knowledge is acquired?**
- **What Skills are developed or improved?**
- **What Attitudes have changed?**

### Pre-test, Post-test

This is a simple way to evaluate learning by comparing the levels of participants before and after the training. This method provides the opportunity to gather quantitative data so that it can clearly show the results. **To check the level of knowledge, you can give the same test before and after the training and compare the results.**

### Questions

**Questions are posed by facilitators occasionally or at the end of the session in order to identify the level of understanding by participants.** After every topic facilitators can pose questions to check participants' understand. Usually, time does not allow facilitators to ask questions to all the participants frequently, they can randomly pick up some participants every time. The question "Do you have any questions?" does not work well in evaluation of learning. You should ask questions like "What are the three components of A?" or "Please summarize the function of B." etc.

**It is strongly recommended that the facilitator should instruct all the participants to state the summary of their learning at the end of the session.** Facilitators could invite each participant to say a few words to summarize the session or what he/she has learned. By listening to them, the facilitators can evaluate their level of learning. It should be noted that information you obtain from this is qualitative and relative.

### Demonstrations

For evaluating skills obtained in the session, demonstrations are the best way. **Facilitators can instruct and demonstrate what they learned in a role play or any other format.** Considering time limitation, individual demonstrates are not feasible. Picking up some participants as representatives of the class could be adequate.

To solve time limitation problems, **facilitators could instruct participants to pair up or form small groups to evaluate demonstrations of each other by using a check sheet.** The evaluation criteria should be clearly indicated and applied so that the result would be fair to every participant though facilitators are not involved in the process.

There is an option that other staff other than the facilitator conducts this in an official manner by taking time at the end of the course to undertake an interview examination. This would provide more precise evaluation information. This is usually employed in the skill based vocation training area.

Questionnaires

**Questionnaires that ask about the level of knowledge to participants themselves are also effective.** Here are some examples of questions that could identify the levels.

Topic	Answer
Topic A	<input type="checkbox"/> 3: I have heard about <input type="checkbox"/> 2: I can explain <input type="checkbox"/> 1: I can teach others

Likart scale can be applied in examples below.

Question	Answer
I can explain topic A	<input type="checkbox"/> 4: Yes very much <input type="checkbox"/> 3: Yes <input type="checkbox"/> 2: A little <input type="checkbox"/> 1: No

**The advantage of this method is that you can gather quantitative data. The disadvantage however is that the response would not be 100% trusted because it is self-checked by participants themselves.**

You can employ this type of questionnaire in Pre-test and Post-test evaluations.



<Example: In-course and End-course Evaluation in the EL/QPI Course>

In the EL/QPI course, evaluation for learning is done through interviews, in-course evaluation and end-course evaluation. The steps are indicated below;

- 1) The course coordinator and staff from MSD in Ghana observe the course and interview several participants to measure how much participants have improved in KSA (In-Course Evaluation).
- 2) At the end of each session, the facilitators examine how far the participants have improved in KSA through quizzes, presentations and other activities. (In-Course Evaluation).
- 3) At the end of each session, the facilitators submit the facilitator's report (In-Course Evaluation)
- 4) At the end of the course, the participants develop detailed action plans (See Appendix 5 Action Plan Form) based on the KSA learned in the course (End-Course Evaluation).
- 5) Within a month after the course implementation, hold a facilitators' meeting or related meeting to review the evaluation results.
- 6) Before implementing the next course, CSTC holds an internal meeting to review evaluation results and comments from facilitators to identify the actions necessary to improve the next course.



Appendix 10-3: Facilitator's Report Form (EL/QPI)  
Appendix 10-4: Pre and Post Questionnaire Samples

## 10.6 How to Evaluate Participants' Behaviour (Level-3)

**Behaviour Evaluation is conducted about within 3 months after the course.** The purpose of Behaviour Evaluation is to assess whether participants continue to utilize the KSA learned in the course and whether their work performance has improved after the course. This level of evaluation can be conducted through the Impact Survey. The evaluation results are shared in the facilitators' meeting which is conducted within a month after the impact survey to discuss how to improve the next course implementation.

**The key questions to be asked in this step are below.**

- **How much transfer of KSA occurred?**
- **What change in job behaviour has occurred as a result of the training course?**

There are various methods for this evaluation such as observation of workplace, interviews/questionnaires to the participants, their colleagues and bosses, focus group discussion,

etc. Performance appraisal data can be a good resource.



<Example: In-course and end-course Evaluation in the EL/QPI Course>

In the EL/QPI course, evaluation for behaviour is done using the Impact Survey by focusing on the implementation levels of Action Plans. The steps are indicated below;

- 1) Within a week after the course, send a letter from the Head of Civil Service to HRMO/CSA to request for support for the participants to implement their Action Plans. The HRMO/CSA offices are subsequently required to contact the respective institutions of participants with a request to assist them in their Action Plan implementation. A month after the course, hold an action plan monitoring videoconference to promote action plan implementation and to share the experiences among participants.
- 2) HRMO/CSA monitor the progress of action plans of participants based on the Monitoring Form once in a month after the course.
- 3) Three (3) months after course implementation, conduct the Impact Survey with CSTC, HRMO and CSA to evaluate the behaviour change of participants in their work places in Sierra Leone and Liberia. The impact survey team conducts the survey.
- 4) During the impact survey, conduct focus group meetings with ex-participants and conduct site visits of two cases of best and worst practices.
- 5) At the end of the impact survey trips in Sierra Leone and Liberia, feedback the tentative evaluation results to HRMO/CSA before leaving the countries. This is done by CSTC Ghana.
- 6) Within a month after the impact survey, hold a facilitators' meeting or related meeting to review the evaluation results and come up with suggestions to improve.
- 7) Before implementing the next course, hold an internal meeting to review the evaluation results and comments from facilitators to identify the actions necessary to improve the next course.



Appendix 10-5: Monitoring Sheet for Action Plan (EL/QPI)  
Appendix 10-6: Interview Guideline for Impact Survey (EL/QPI)

## 10.7 How to Evaluate The Results (Level-4)

**Result Evaluation is conducted 3 to 6 month after the course.** The purpose of Result

Evaluation is to assess whether the institutions which sends participants to the course benefit from the training course. The evaluation results are shared in the facilitators' meeting which is conducted within a month after the impact survey to discuss how to improve the next course implementation.

The key questions to be asked in this step are below.

- To what extent did the institution's quality improve as a result of the training course?
- To what extent did the institution's productivity improve as a result of the training course?
- To what extent did the training affect the institution?



<Example: In-course and end-course Evaluation in the EL/QPI Course>

In the EL/QPI course, evaluation for the results is done through the Impact Survey by focusing on the implementation levels of Action Plans. During the impact survey, evaluators conduct focus group meetings with ex-participants and conduct site visits to two cases of best and worst practices. In this evaluation, the effects of implementation of the action plans on participants' institutions are also assessed. Thus evaluators place emphasis on interviews with supervisors or higher level officers for this assessment. At the end of the impact survey trips in Sierra Leone and Liberia, MSD in Ghana provides tentative evaluation results to MSD in HRMO/CSA.

## 10.8 Accept Feedback from Participants

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Evaluation is important for upgrading facilitators' skills and for improving the training course as a whole. After the course, facilitators receive feedback from the participants. Accept both positive and negative feedback. **Facilitators reconfirm their strength by positive feedback and understand points to be improved by negative feedback.** Do not be afraid of receiving negative feedback but consider them as precious advice to improve yourself. The evaluation is not the performance appraisal to determine your salary, but its objective is to improve training course by upgrading your skills.



#### Example: Grading up skills by feedback from participants>

Facilitator Mrs. A obtained rather negative feedback on her style of presentation that the session was participatory and interesting but it was difficult to maintain the concentration of participants until the end. She revised her lesson plan by inserting some small group work and energizers and delivered following the new plan. The new version of the presentation was highly appreciated by participants and obtained a lot of positive comments.

### 10.9 Contribute to Evaluation Meeting

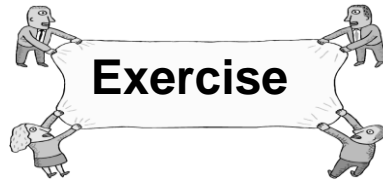
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A facilitators' meeting for evaluating the course is organised after the course. Facilitators should participate as a first priority. **The valuation meeting is the best opportunity to share experiences among facilitators and learn from each other. Facilitators are expected to be honest and open and to disclose failures during the sessions so that others can learn from their experience.** The meeting should create an atmosphere where facilitators can open up. The information provided in this meeting will be used only for the sake of improving the course and should not be used for other purposes such as the facilitator's performance appraisal.

### 10.10 Summary

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In this module, the evaluation of training course has been explained by applying the Four Levels of Evaluation Model that comprises of Level-1:Reaction, Level-2:Learning, Level-3:Behaviour, Level-4:Results. Level 3 and 4 should be conducted some time after the completion of training. Methodologies are interview, focus group interview, demonstration, questioning, questionnaire, observation, etc. Facilitators should contribute to Level-2 evaluation by checking participants' understanding during the sessions. The most important thing here is that the result of the evaluation should be used to improve the training course and the ADDIE process. All the people involved in the training process should participate in the evaluation process and receive feedback for further improvement.



**“Let’s Create End-Course Evaluation Questionnaire!”**

Let’s create a questionnaire for obtaining feedback on your facilitation as part of the End-course Evaluation Questionnaire using the following steps.

Step-1: Select a topic for the session.

Step-2: Think about the skills/techniques that you would like to develop in your facilitation.

Step-3: Create some questions sentences to obtain feedback to identify current level of selected skills/techniques.

In this step, apply the Likert 3 scale for Pre-coded types of questions by using the template below. (3:Good, 2:Soso, 1:Not good)

\*Refer to the Appendix 3-4: How to Develop Questionnaires.

<b>Questionnaire Template</b>		
<b>Session Topic:</b>		
<b>Skills/techniques that you would like to develop:</b>		
Questions		Feedback
Question-1		5 3 1
Question-2		5 3 1
Question-3		5 3 1
Question-4		5 3 1
Question-5		5 3 1

[end]



