TRAINING EVENTS ON-LINE (TEOL)

User's Guide and Tutorial

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On-Line Version

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ACRONYM LIST

ADS	Automated Directives System
COTR	Contracting Officer's Technical Representative
DGSR	Office of Democracy, Governance and Social Reform
E&E	Bureau for Europe and Eurasia
EEUD	Office of Environment, Energy, and Urban Development
ENI	Bureau for Europe and New Independent States
FY	Fiscal Year
GTD	Global Training for Development
HBCU	Historically Black Colleges and Universities
HSI	Hispanic Serving Institution
IR	Intermediate Result
ISTI	International Science and Technology Institute, Inc.
KSA	Knowledge, Skills, and Attitude
MPP	Mission Performance Plan
R4	Results Review and Resource Request Document
RP	Results Package
SO	Strategic Objective
TA	technical assistance
TEOL	Training Events On-Line
TERF	Training Event Request Form
TRC	Training Results Chain
TRG	Training Resources Group, Inc.
USAID	United States Agency for International Development
USG	United States Government
WID	Women In Development

GENERAL BACKGROUND—E&E TRAINING PROGRAMS

Training Events have been critical components of USAID's foreign assistance to Central and Eastern Europe and the New Independent States since the Agency began delivering development assistance to the region. Training occurs throughout the assistance portfolio and plays a supporting role in achieving many Strategic Objectives (SOs). Therefore, it is important to

- articulate clearly the expectations for Training Events[1] and programs;
- ensure that events are linked to the appropriate Intermediate Results (IRs) and Strategic Objectives (SOs);
- establish measurable and achievable training objectives for each Training Event;
- monitor and manage training implementation contractors and providers of training activities; and
- evaluate whether training has achieved its stated objectives, especially with respect to the achievement of IRs and SOs.

Without planning, it is difficult to ensure that training resources will be used as effectively as possible to achieve indicators identified by the results review and resource request (R4) design process.

In 1993, the ENI (now E&E) Bureau began using a Training Plan format that highlighted the Training Event as a major input for achieving USAID goals. As USAID moved into reengineering and the establishment of IRs and SOs, the training planning process became more rigorous. It now requires USAID staff and contractors to define the human resources required to achieve IRs/SOs and to refine training goals, objectives, and profiles of training candidates—making them more measurable and precise.

Training Plans now include

- overviews of Mission portfolios;
- a summary of performance gaps in Knowledge, Skills, and Attitudes (KSA) that must be addressed so that indicators can be achieved;

[1] A Training Event is any individual training activity such as a course, observational study tour, seminar, conference, workshop, etc., whether an in-Country and/or third-country and/or U.S.-based training activity.

- Training Events (Training Events Request Forms) that address Mission needs, including institutional linkages, a projected schedule of events, and resource requirements; and
- trainee profiles, etc.

While Training Plans focus on training activities funded under the Global Training for Development (GTD) program, they should include all USAID-funded training activities.

Text from the Training Plans is used to

- develop requests for training proposals;
- prioritize and justify USAID Training Events/resource requests;
- draft trainee profiles to identify individuals most likely to contribute to the achievement of IR indicators (i.e., trainee selection criteria);
- inform trainees of the objectives of the Training Event as well as to design Action Plans for trainees and develop Stakeholders' Agreements;
- consult host-country partner institutions and organizations in preparing for the Training Event;
- design, monitor, and manage Training Events; and
- establish the framework for monitoring and evaluating the Training Event and its contribution to achieving IR indicators.

In spring 1997, ENI/DGSR/HRDSR (now E&E/EEUD) undertook the design of a computer database as a repository of E&E training plans on the World Wide Web (www), making the plans accessible to more than just individual Missions. The information in the database was to be available to Missions throughout the E&E region (as well as to their training implementation contractors) and to USAID/W.

The database permits Missions throughout E&E to compare, evaluate, coordinate, replicate, and communicate with each other on Training Events and to adapt best practices to individual Mission needs. Creation of the database was organized around three major goals.

- It should be user-friendly.
- It should require neither the development nor installation of special software.
- It should lend itself to use with little or no training (other than this User's Guide).

The result is the Training Events On-Line (TEOL) database found on the Training Assistance for Central and Eastern Europe and the Independent States website located at http://www.enitraining.net and available through http://www.info.usaid.gov/regions/eni.

The TEOL database includes an interactive form for developing, proposing, editing, approving, and then implementing, monitoring and evaluating, and reporting on Training Events in the E&E region. The form is called the Training Event Request Form (TERF).

The TERF forms the base from which the following documents and reports can be developed (list is illustrative):

- Mission and/or E&E-wide Training Plans;
- reports of individual Training Events (by Country & Mission Strategic Objective, E&E Strategic Objective, FY/Quarter, and status);
- budgeting and planning worksheets containing estimated costs of individual Training Events, prioritization of Training Events, schedule of Training Events, etc.;
- an interview guideline with prompts to aid in the design and development of Training Events for results and impact;
- trainee selection criteria;
- an Action Plan and Stakeholders' Agreement; and
- a Monitoring and Evaluation Plan.

The information required for the TERF can be obtained from a variety of sources including, but not limited to,

- the Mission's approved Strategic Plan and R4 document, project papers, and institutional assessments;
- budget documents and other sources of funding information;
- the Mission Performance Plan (MPP);

- SO and Results Package (RP) teams (core and expanded) as well as individual team members;
- training implementation contractors; and
- technical assistance contractors/grantees, host-country institutional and government counterparts/partners, and returned and prospective participants, among others.

Individual Training Events are developed by using the TERF.[2] The compilation of approved Training Events is the heart of a country's or region's USAID Training Plan. The TERF contains a workflow pattern that allows for a Training Event's creation, review, approval, modification, and completion or cancellation.

For additional assistance in using the TERF to develop events that demonstrate direct support for the achievement of IRs and SOs, E&E/EEUD has developed a workbook on the Training Results Chain (TRC) — *Training for Results: A Workbook for Developing and Monitoring USAID Training Under Reengineering (September 1999)*.[3] It is recommended that the TRC Workbook be completed at least once before using the TERF.

> Note. While the TERF was initially developed for use by E&E country Missions and their training implementation contractors, it may be used (and accessed) by others such as technical assistance contractors and grantees involved in developing USAID-funded training activities. The E&E training office recommends that <u>all</u> USAID-funded training activities be included in the TEOL system and thus a Mission's Training Plan.

Approved Training Plans are accessible by USAID Missions regionwide, by USAID/W offices, by training implementation contractors, by technical assistance contractors/grantees, and other authorized users (financial information is not available beyond the Mission of origin). Completed Training Events are available

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[2] Two models are suggested. Model #1—USAID officer develops first draft; the training implementation contractor staff provides additional information and language and returns the revised draft to the USAID officer for review, editing, and submission for funding. Model #2—the training implementation contractor staff develops event(s) after consultation with USAID staff and others (e.g., expanded SO teams); the USAID officer responsible for the event then reviews the draft, edits as necessary, and submits it for funding.

[3] Copies are available from the person responsible for a Mission's training activities, from E&E/EEUD, or from the E&E Training Assistance website (http://www.enitraining.net).

for public review. Anyone with access to the Internet may call up the TEOL in read-only format, with limits on what information can be read.

TEOL users are strongly encouraged to review USAID's ADS 253 as well as the E&E Participant Training Manual, especially if they are not completely familiar with USAID training activities.

The TERF and the documents and reports resulting from it are not meant to supersede or take the place of any other reporting system.

DEVELOPING A TRAINING PLAN

The following steps are recommended for developing a Mission's Training Plan:

Step 1. In SO/RP team meetings (core and expanded), USAID staff identifies performance needs and determines what types of training interventions are needed to address those needs. Input is encouraged from other TA contractors/ grantees, institutional partners, host-country counterparts (public and private), returned trainees, and others.

The collected information forms the basis for one or more Training Events that directly support achievement of specific IRs (and sub-IRs) that, in turn, support an identified SO (refer to the TRC Workbook for additional guidance as well as exercises to assist SO teams in identifying performance needs). The information—especially for GTD-funded training activities—is captured on one or more TERFs.

Step 2. From the above discussions, individual Training Events are developed by using the TERF. While an event is under development, it can be considered a team effort. Several authorized users have the right to edit and improve the training design.

> A Mission may request a common (single) user name and password for an entire SO team to allow members to develop training events collaboratively. Refer to page 15 for additional guidance on "User Registration and Access." Individual members, such as SO team leaders, may also be issued individual user names and passwords.

Step 3. Once a Training Event is fully developed by those involved in Steps 1 and 2[4] (including filling out the approval boxes in Section H with the designated USAID supervisor/managers who must review/approve the Training Event), the author of the Training Event changes the event's status to **Proposed**. Then the author advises those listed in Section H that the TERF is ready for their review and approval. At this point, if required, an SO team leader or office director or other more senior USAID officer may review and/or edit TERFs with the status of **Proposed** and indicate approval or return for more information/work; such users

[4] Persons involved in the development of a Training Event may view and/or edit the document electronically by using the TEOL, provided that they have been assigned appropriate passwords.

would be assigned access level 3.[5] The review/edit process may be repeated as often as the Mission requires. Note that a text box in Section H allows all those listed to add conditions to approval and/or other comments. The TERF may also be printed out for approvers to initial or sign over their names.

The Mission's Training Officer can view any and all TERFs with the status of **Proposed** by accessing the TEOL database, selecting "Training Events-By Status" on the left menu list on the TEOL Summary Table, and reviewing TERFs with the status of **Proposed**.[6] At the same time, virtual members (e.g., SO team members resident in USAID/W) are able to view and comment on individual Training Events.

The Mission may designate an individual or a group of individuals to review (and edit as necessary) all TERFs with the status of **Proposed** and select those to be recommended for final approval by the Mission Director (or designee). At this point, the individual/committee should review the priority levels of each TERF and make changes as needed.

Step 4. The Training Officer drafts an Executive Narrative based on the preliminarily **Approved** TERFs and provides other information required by the Mission. The Executive Narrative should also include other USAID-funded training activities/events (i.e., project-funded training).

The TEOL system then produces a Mission Summary Table that lists all Training Event Request Forms approved and prioritized for GTD funding (Step 3). The Executive Narrative, Summary Table, and approved TERFs make up a Mission's Training Plan.

Refer to section on "Additional Tools and Other Information."

Step 5. After a TERF is approved, a notice may be sent to USAID staff, including TA and training implementation contractors, indicating that **Approved** TERFs are now online at the E&E training website. The totality of approved TERFs constitutes the core of a Mission's Training Plan.

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[5] Developers of Training Events advise supervisors/managers that an event is ready for review on the TEOL.

[6] See Appendix E for detailed information and additional guidance in preparing a Mission's Training Plan.

TERFs **Approved** for funding indicate that funding is authorized but not necessarily available. Given that prioritization is part of the TERF process, an **Approved** Training Plan establishes a sequence for funding (at whatever dollar level and whenever it is received). The TEOL allows the Mission to change priorities as funding, country, and/or program situations change. It also allows the Mission to reschedule or **Cancel** an Event. **Approved** TERFs may also be returned for revision as circumstances dictate; click on the individual TERF, click on the Edit icon, and click on the blue hyperlink entitled "Click Here to Return for Revision." The document will return to **Under Development** status with the following description: "Previously approved and then returned for revision on (date)."

The **Approved** Training Plan is now electronically accessible to authorized users throughout the Mission as well as to the training implementation contractor, who can then begin implementation procedures.[7] Authorized users within E&E/EEUD and other regional and Washington offices are also able to view approved Training Plans.

Step 6. After the Training Event has occurred, the TERF's status is designated as **Completed**. A final section, "Section I. Post-Training Information", appears on the TERF when a Training Event's status changes to **Completed**. The training implementation contractor can fill out much of this section.

While a wide audience may view the Training Plan, only individuals with an appropriate access code may edit the individual Training Events that make up a Training Plan. Budget information contained in Section G is not widely available. A designated person within each Mission assigns user names and passwords to authorized TEOL users—often the Mission's staff person responsible for training activities (i.e., Training Officer).

> Reminder. Refer to the addendum on Preparing a Training Plan for Approval located in the Appendix. The addendum is directed at Training Officers and users with access levels 3 and higher.

[7] Based on current prioritization and the schedule of approved Training Events contained therein.

GETTING STARTED

You are strongly encouraged to read this User's Guide/Tutorial from beginning to end before developing a Training Event. Additional guidance and assistance is available in the E&E TRC Workbook.

To ensure a successful experience with the TERF, the following prerequisites should be met:

- The user has basic familiarity with computer use (terms and actions, especially use of the mouse to point and click) and experience in accessing the Internet.[8]
- The user has a compatible Web browser.
- The user has access to a computer with a stable Internet connection (check with your Mission's computer specialist if you are uncertain about the stability of your connection and/or access).
- The user has received a user password to access the TERF sites.[9]
- The user has read the TEOL User's Guide/Tutorial.
- The user has reviewed the E&E TRC Workbook and completed the exercises.

Illustrations of computer screens are taken from the Netscape Navigator browser version of the TEOL; for those with other browsers, the screens may look somewhat different. Appendix C contains sample screens.

Obtain your user name and password. The Mission's designated Training Officer will assign user names and passwords (see "Additional Tools and Information").

Sign on. There are several different ways to access the TEOL website. The most common way is to type in the website address once you are connected to the Internet. (You may need to receive approval from the Mission's computer specialist to log onto the Internet or to use a computer terminal with Internet access. Please check with the appropriate person in your Mission.)

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[8] Refer to the Technical Instructions and Browser Preferences section.

[9] To receive your password, check with your Mission's designated Training Officer or contact E&E/EEUD, Jim Nindel, at jnindel@usaid.gov.

Reminder. The TERF that helps project officers and others develop Training Events for results is located within the TEOL database, which is located on the E&E website. If you are a first-time user, read this User's Guide/Tutorial while at your computer to practice developing a Training Event. Start at "Type" after you have signed on to the Internet. Allow at least one hour (preferably more) for this exercise.

Access the E&E training assistance website. Type in http://www.enitraining.net. The opening screen (see next page for illustration) is the "home page" from which you may access various E&E training support areas, including the TEOL/TERF. If you have not already done so, please take a few minutes to read the screen.

Depending on your computer, the Internet system, and/or your connection speed, it may take a while for the different screens (pages) to download.

You are encouraged to click on the buttons on the left to access and read various E&E training support areas. Bookmark the opening screen and return to it later to read about these areas.

On the home page, you need to access the TEOL by using one of three options:

Option #1. Point, click, and pull down the menu under "Quick search" located at the upper left-hand corner of the screen, select TEOL, and click; or

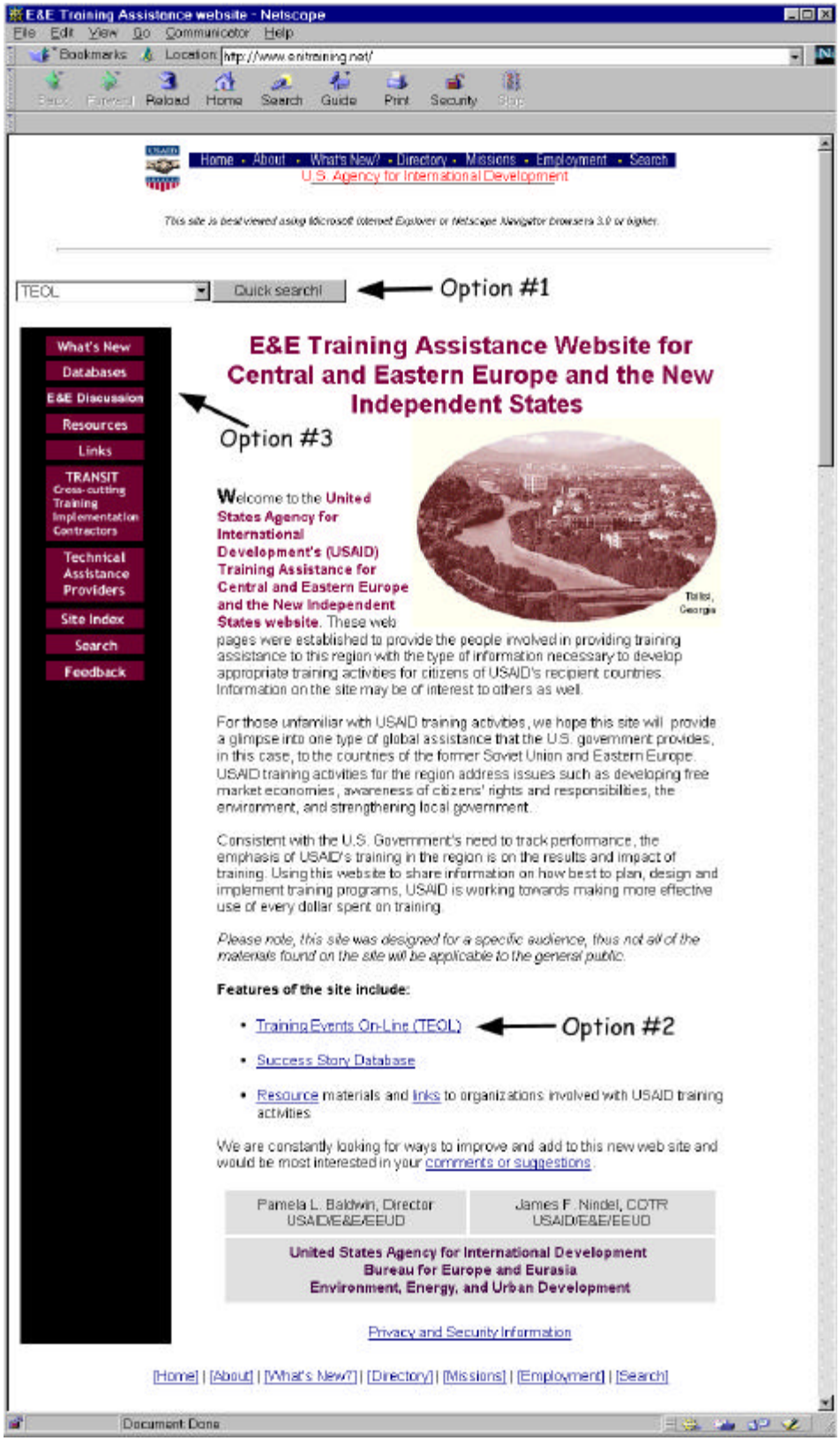
Option #2. Point and click on "Training Events On-Line (TEOL)" listed under "Features of this site include"; or

Option #3. Point and click on "Databases" on the menu to the left of the home page to go to the database opening page. The user may click on the icon button labeled "TEOL."

The first two options link directly to the TEOL.

Take a few minutes to locate each of the options listed above to determine which is easiest for you. Now, go to the TEOL site by selecting one of the above options.

The first screen should appear as below.



Take a few minutes to read the screen. The information and links listed on the screen provide additional training support and information.

Enter the TEOL. On the introduction page of the TEOL, you will see the following boxes located at the left of your screen:

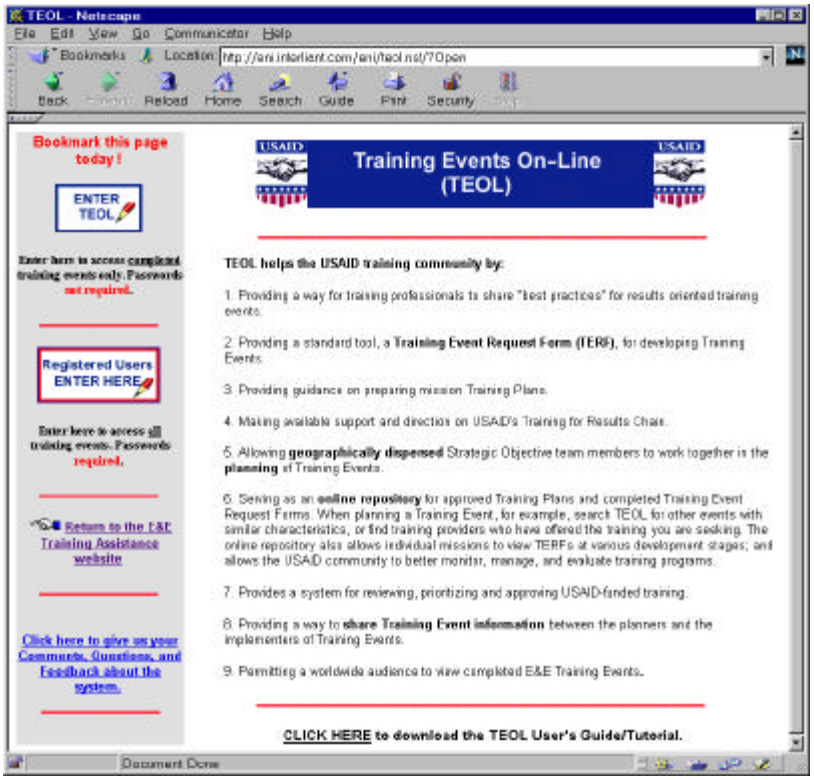
- **ENTER TEOL** — If you do not have a password, click on this box to read completed USAID-funded Training Events.

- **Registered Users ENTER HERE** — If you are a registered user—i.e., you have been assigned a user name and password—point and click on this box. To become a registered user, contact the Mission's designated Training Officer.

> Note. The TEOL program will automatically save the password of the user. If another user wants to access the TEOL/TERF system, the first user must log out by exiting out of the E&E website or by clicking on the "refresh" or "reload" button on the computer screen.

You will also see a "hyperlink" **CLICK HERE** located in the center of your screen. Click on the hyperlink to download extra copies of this TEOL User's Guide/Tutorial.

The page should appear as shown here.



Click on the box marked "Registered Users Enter Here." A password box will appear on your screen. Type in the user name and password assigned to you. Click OK or simply press the "Enter" key on your keyboard.

User registration and access. To access the E&E website and use the TEOL/TERFs programs, you will need an assigned user name and password, which are assigned by the Mission staff person responsible for training (i.e., Training Officer). Individual Missions determine appropriate access levels for their staff and country users such as TA contractors/grantees.

The following access levels have been developed:

- Access level 1 (Reader). Users may read only **Completed** Training Events. They cannot develop or edit TERFs. Users include the general public or anyone with access to the Internet. No User Name or Password is required. (Users at this level enter the TERF program by clicking on the ENTER TEOL icon located on the opening page of the TEOL.)

- Access level 2 (Author). Users may develop TERFs for assigned programs, read and edit events they have developed, change the status of TERFs from **Under Development** to **Proposed,** and read **Approved** TERFs from throughout the Mission and **Completed** Training Events for Missions throughout the E&E region. Typical users include project officers and TA contractors; they are considered "authors."

  An SO team may request a common user name/password to permit team members to develop TERF(s) collaboratively (i.e., edit **Under Development** TERFs).

  Note. Once an author changes the status from **Under Development** to **Proposed**, the author will not be able to edit the document (unless the Training Officer or someone with Editor status returns it for revision).

- Access level 3 (Editor). Users may develop, edit, and read TERFs within their specific Mission, change the status of individual TERFs from **Under Development** to **Proposed,** and read **Approved** TERFs from throughout the assigned Mission and **Approved** Training Plans for Missions throughout the

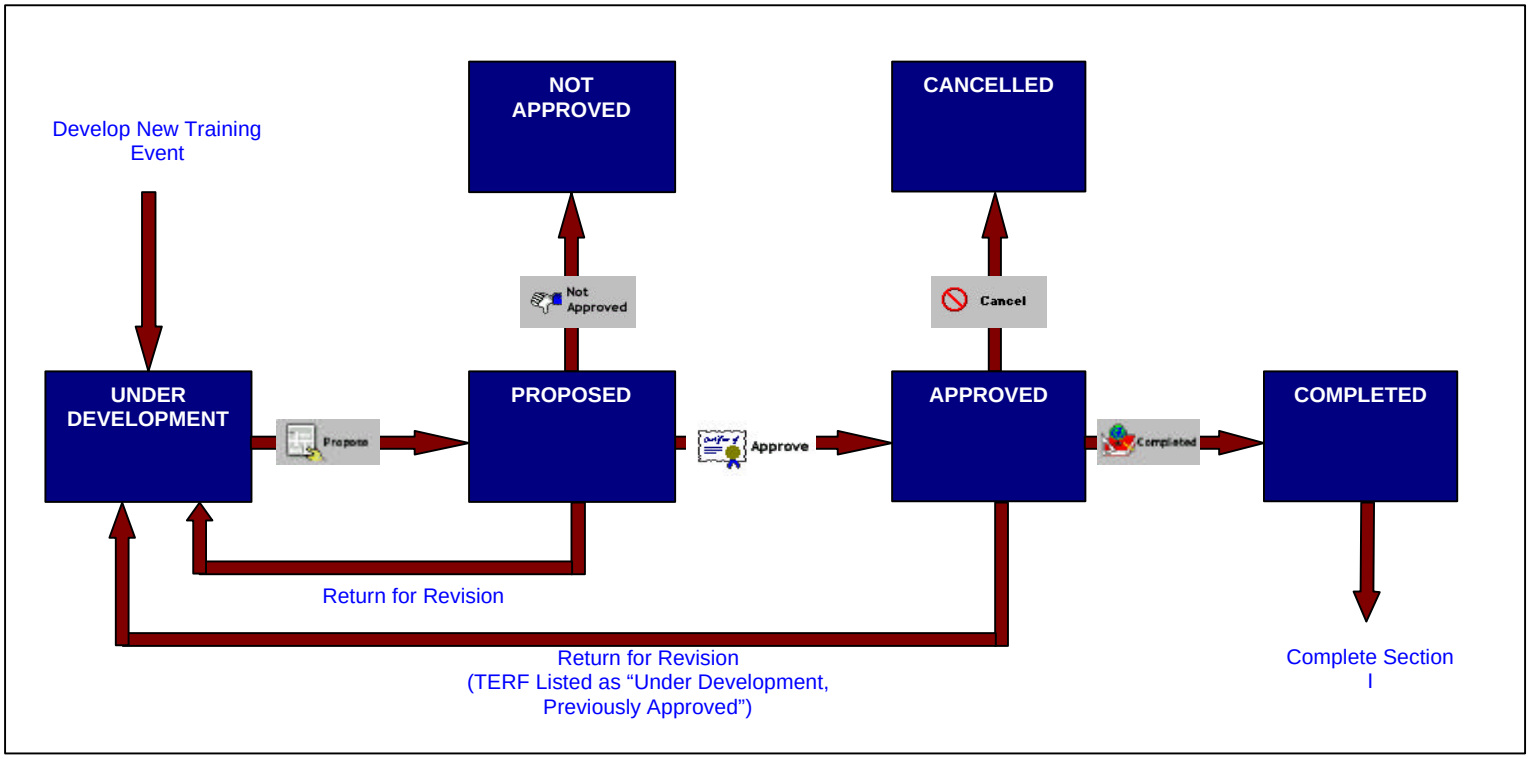
E&E region. Users who work with more than one Mission (e.g., training implementation contractors in the field and Washington and E&E/EEUD staff in Washington) have access to TERFs that are **Under Development** throughout the E&E region. Other typical users include SO team leaders, office directors, and those staff members who are part of the approval process for TERFs. They are considered "editors" and, in addition, can read Executive Narratives and Summary Tables.

- Access level 4 (Manager). Users may develop, edit, and read TERFs from throughout an assigned Mission. They are responsible for the status of all Mission TERFs, assign user IDs and access levels, finalize approved Training Plans for the assigned Mission, and may read all approved Training Plans from throughout the E&E region. Users at this access level include Mission staff responsible for training programs (the Mission's designated Training Officer) and other designated senior management in the field and USAID/W, including E&E/EEUD and its training implementation contractors. Users at this level are considered "managers" and are responsible for drafting the Executive Narrative and maintaining status level changes for all TERFs. Additionally, level 4 users can view Summary Tables.

> Note. When you first receive your user name and password, please check your access level. If the Edit icon does not appear at the top of the TERF document, the user does not have the proper access level or password. Please check first with the Mission's designated Training Officer who will check with the E&E webmaster to correct any access/password errors.

Refer to the flow chart and table on the following pages for a more detailed overview of how TEOL access levels work.

Flow Diagram of TEOL Development, Review and Approval Process



TEOL Access Levels and Functions

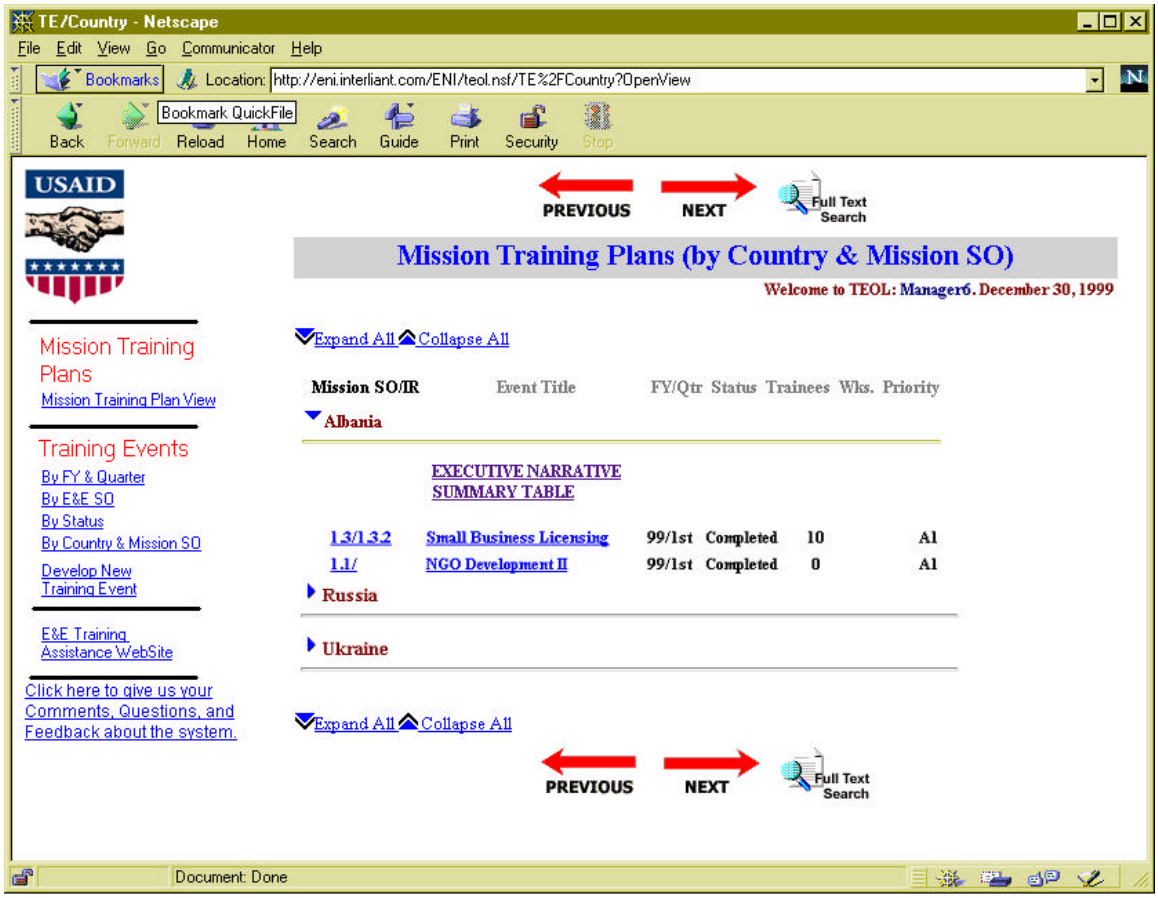
	Single TERF	Mission TERFs	Regional TERFs
Level 1 (Reader)	• Read **Completed**		
Level 2 (Author)	• Write and edit own **Under Development** • Change own to **Proposed**	• Read **Approved**	• Read **Approved**
Level 3 (Editor)	• Write and edit own **Under Development** • Change own to **Proposed**	• Edit **Under Development** • Change **Under Development** to **Proposed** • Change **Proposed** to **Return for Revision** • Read **Approved** • Read **Executive Narrative** • View **Summary Table**	• Read **Approved**
Level 4 (Manager)	• Write and edit own **Under Development** • Change own to **Proposed** • Change to **Approved** • Change own to **Completed**	• Edit **Under Development** • Change **Under Development** to **Proposed** • Change **Proposed** to **Approved, Return for Revision**, or **Not Approved** • Change **Approved** to **Return for Revision, Completed,** or **Cancelled** • View financial data (Section G) • Enter post-training data (Section I) • Write and Edit **Executive Narrative** • Assign user access levels • View **Summary Table**	• Read **Approved**

When a registered user enters the TEOL, the next screen to open is the TEOL repository site, which is set (default) on the "Mission Training Plans (By Country & Mission SO)."

The TEOL is a repository for both Training Events and components of a Mission's Training Plan as well as a tool for developing Training Events. A registered user with an assigned password may view Training Events by Country and Mission SO, FY and Quarter, E&E SO, or Status. Your view of Training Events depends on your

access level. Most users will be able only to view their own **Under Development** TERFs and **Approved** TERFs.

The repository site should appear as below.



Before beginning to develop a Training Event, you may want to review events already developed by other Missions in the E&E region to see if any might be applicable and adaptable to your needs.[10]

How to Use the TEOL repository site. The opening screen automatically displays "Mission Training Plans (By Country & Mission SO)." To view titles from a specific country, point and click on the blue arrow located next to that country; to view titles from all countries, point and click on "Expand All"—a list of all countries with approved Mission Training Plans. Click on any listed item to view details of the selected event. You will be able to view all **Approved** Training Events for your

[10] Until Missions become familiar with the TEOL, there may not be many Training Events online.

Mission only and **Completed** Training Events of other Missions.[11] In addition to housing approved and/or completed Training Events, the Training Plan repository site provides access for level 3 and 4 users to a given Mission's Summary Table and Executive Narrative. Section H provides a more detailed discussion of these Training Plan elements.

Additionally, the TEOL repository site displays Training Events sorted by FY and Quarter, E&E SO, Country & Mission SO, or Status. Point and click on the appropriate selection on the menu located at the left-hand side of the screen to access these sorted listings.

[11] Access to **Approved** as well as **Completed** Training Events by all Missions is currently under review. Since TEOL/TERF is a new program, access to it is more restrictive.

DEVELOPING TRAINING EVENTS

When you are ready to develop an individual Training Event, point and click on the blue hyperlink labeled "Develop New Training Event" located at the middle left of the screen (see illustration above). You should see a blank Training Event Request Form or TERF. The TERF is structured to organize your responses for developing a Training Event for results and impact following USAID's Training Results Chain or TRC (please refer to the E&E TRC Workbook). For a sample of a blank TERF and the opening screens of the TEOL and repository site, please see Appendix C.

> Reminder. Additional support and resources are available on the E&E Training website (www.enitraining.net). The E&E TRC Workbook is located at that website and can be downloaded.
>
> Program assistance and more detailed information on the use of the TEOL and TERF are also available from E&E/EEUD as well as from representatives of the training implementation contractors.

As a Training Event is under development, you are strongly advised to save your work section by section, especially if there are problems with the power supply or Internet access. You may save your work at any time and return to it to complete or edit it. Look for the icons marked "Save" located at the top and bottom of each template document. These icons are also located at the beginning of each TERF section. As you exit from the TERF, you will be reminded that you should save your work (see the section on "Additional Tools and Other Information").

Online help. Online help is available for each section of the TERF. To access online help, click on the button labeled "Help." The online help includes specific information to help you fill out each section. In addition the E&E website has a number of ways to access feedback sites for questions or concerns you may have that are not addressed by this user's guide or the online help buttons:

1. E&E Discussion database—click on Discussion Database on the menu located to the left of the opening page; then click on either of two blue hyperlinks on the database opening page.
2. Click on the feedback button on the menu located to the left of the home page.
3. You may also click on any of the blue hyperlinks located in the text of the welcome letter on the E&E home page.

Questions and other concerns may be sent to the website administrator or the E&E training office (jnindel@usaid.gov).

The TERF is divided into nine sections as follows:

- Section A General Information
- Section B Intended Results
- Section C Training Event
- Section D Background/Supporting Information
- Section E Trainee Profile
- Section F Academic Training
- Section G Cost Estimates
- Section H Approvals
- Section I Post-Training Information[12]

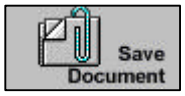
Begin with Section A and proceed through Section H.

Although you are strongly encouraged to fill in information in the order requested, you may skip section(s) or go back and forth between sections. It is not necessary to fill out all sections if the information requested is not yet available, essential, or pertinent to the Training Event. The TEOL system allows you to return to your **Under Development** TERF at any time to add, delete, or edit information. However, the country and Training Event title must be entered if you want to save any given document.

As part of this tutorial, let's develop a Training Event to address performance needs identified for an IR/SO of concern to you. For this exercise, we begin with Section A and fill out, in order, all sections for a short-term technical Training Event. To practice using the Training Event Request Form, you may elect to work on completed exercises from the TRC workbook.

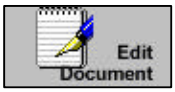
[12] Section I appears only when the Training Event has been **Completed**.

Note the icons at the top of the screen. You point and click on these to

- Save your work (Save Document) 

- Close your work (Close Document)

- Copy the TERF (Copy Document)

- Edit the TERF 

- Propose the TERF

Training Event Status. As you begin to develop your first Training Event, the status of the TERF is automatically set as **Under Development.** Notice the box labeled "Propose." The **Propose** box automatically appears each time you begin to work on or edit a Training Event **Under Development.**

When you are satisfied with your completed Training Event Request Form and wish to submit a TERF for funding consideration, point and click on **Propose**. The TERF status has now changed from **Under Development** to **Proposed.** The status of an individual TERF appears at the upper right-hand corner above Section A; all TERFs open with the event status as **Under Development** until the user changes that status. The TERF program also provides the user's name and last update.

All TERFs in the **Proposed** status are reviewed and approved by supervisors and forwarded to those responsible for training activities (additional details are provided later). TERFs may now be **Approved** or **Not Approved** or returned for revision. **Approved** TERFs may be **Cancelled** or implemented. When a Training Event is delivered, its status changes to **Completed**.

Refer to TERF status levels in "Additional Tools and Information."

FILLING IN A TERF[13]

Training Event title. In a text box appearing under the Event Title bar, type in an event title **if** you have a good idea of the training activity you will be creating. The Event Title will show up in Section C.2. Users may edit the event title if necessary.

You may use the tab key on your keyboard to move from one section to another, or you may use your mouse to scroll down and click on the next section.

SECTION A—GENERAL INFORMATION

SECTION A.1 - USAID Country and SOs

Country. For any user assigned access level 2, 3, or 4, the TERF automatically displays the country associated with the user's name and password. To confirm that the TERF has identified the country for which you are developing a Training Event, point and click on the circle preceding the country name. Please note that once you save your document, you will not be able to change the country; the country selection can be changed only by the Mission's designated Training Officer.

Regional offices. If participants from more than one country are to attend a Training Event, a separate TERF must be filled out for each participating country in order to track funding for Mission-specific SOs and for purposes of record keeping and data collection (refer to "Copy" instructions in the section on "Additional Tools And Other Information").

The TEOL/TERF system is programmed to enable those with proper user names and passwords (determined by a mission's Training Officer) to develop and/or edit TERFs for one or more countries within the region.

The TERF enables users to identify SOs by both Mission language and language drafted by the E&E Bureau. Using your mouse, point and click on the right down arrow to pull down a menu of SOs for Mission or E&E Bureau language or both. In developing the TERF, the Mission SO is considered "primary."

[13] It is recommended that you keep this User's Guide next to your computer when you fill out your first Training Event Request Form. You may also use the "help" buttons located in each section.

The SOs listed under E&E SO are the USAID/W-provided Strategic Objectives. The SOs listed under Mission SO are those provided by your Mission. All users must select one "primary" Mission SO and one E&E SO. (Note that all Training Events will be sorted in the databose by their designated "primary" Mission and E&E SO.) A "supplemental" Mission SO may also be selected, as applicable. The Mission SO(s) appears again in Section B—Intended Results.

> Refer to Exercises 1 and 2 in the TRC Workbook for additional support. The Workbook is helpful for the tasks required in Step 1, "Developing a Training Plan," as described earlier in this User's Guide.

Tab or scroll down to the next section.

Section A.2 - USAID Technical Officer

Position the cursor in the first box. (You may use the tab key to move to the next box or position the cursor and click to fill in each box.)

Type in your name and other information requested.

USAID Officer	USAID employee requesting Training Event (cognizant officer)
Position	Example: Project Officer, Private Sector Adviser, COTR, SO 1.1 Team Leader, etc.
Office	Example: Human Resources, Democracy, Economic Restructuring, etc.
Telephone Number	Include country code, city code, and other codes/extensions as needed
Fax Number	Include country code, city code, and other codes as needed
Email address	Enter full email address, even if it is a USAID address

Tab or scroll down to the next section.

Section A.3 - Technical Assistance (TA) Contractor/Grantee

Enter the requested information. List the primary TA contractor/grantee first. If there is more than one TA contractor/grantee associated with the Training Event, provide name and contact information in the box labeled "Additional TA Contractors/Grantees." TA contractors/grantees who may be helpful in identifying the most appropriate candidates should be listed here.

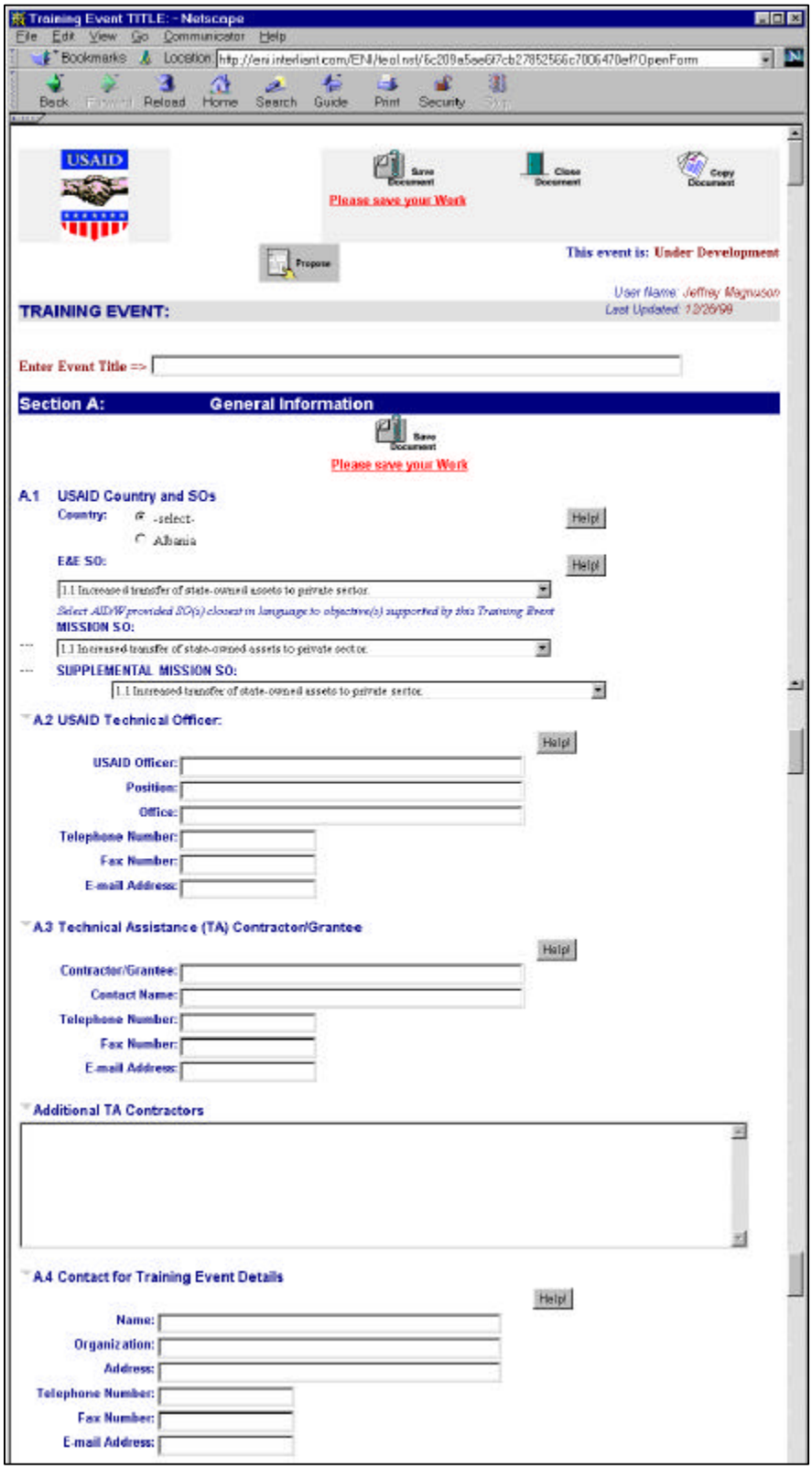
> For this tutorial, select a TA contractor and type in the information requested; tab to the next section.

Section A.4 - Contact for Training Event Details

Enter the requested information. If the information is for other than the USAID technical officer, type in the information on the person(s) assisting with the development of the Training Event. The person(s) may be the in-country staff of the training implementation contractor(s) or consultant(s) charged with the development of the Mission's Training Plan.

Type in the name of your Mission's training implementation contractor; tab to the next section.

Section A of the TERF will appear as below.



Remember to save your work by pointing and clicking on the "Save" icon.

SECTION B—INTENDED RESULTS

This section reflects application of USAID's Training Results Chain (TRC). E&E/EEUD has developed a workbook on the TRC to encourage use of the training tool. Reading and completing exercises in the TRC Workbook will make this section easier to complete. If you have not received a workbook and would like one, contact your Mission's designated Training Officer and/or E&E/EEUD (jnindel@usaid.gov).

Section B.1 - Provide Brief Background on Selected SO

The TERF program automatically inserts the E&E SO(s) and the Mission SO(s) selected in Section A.1. Remember that only the primary SO is listed. Position the cursor within the text box and (if applicable) enter additional SO(s) supported by this TERF and provide brief background information on the SO(s) selected. Information may come from the Mission's approved Strategic Plan and R4 document, which describes the context for the requested training. (Note. You may be able to copy and paste information if these documents are computer-resident or available on diskette. Check with the computer specialist in your Mission.)

Refer to Exercise 2 in the TRC Workbook.

Tab or scroll down to the next section.

Section B.2 - Intermediate Result (IR)

Type in the relevant IR number(s) in the first text box. If more than one IR is addressed by the TERF, type a comma between each. Next, move the cursor to the larger text box and type in the text associated with the IR number(s). (Note. IR refers also to sub-IR(s). You may be able to copy and paste information if it is computer-resident or available on diskette.)

Refer to Exercise 3 in the TRC Workbook.

Tab or scroll down to the next section.

Section B.3 - Performance Indicators, Baselines, and Targets

In the text box, type in the Performance Indicators, Baselines, and Targets identified by the expanded SO team to determine how, how well, or whether progress is being made to achieve an IR. The requested information may also be found in the Mission's R4 document. It is essential for developing a Training Event and provides the basis for a Performance Monitoring Strategy as well as for an Evaluation Plan for the selected SO.

> Refer to Exercise 4 in the TRC Workbook as well as to the Mission's Strategic Plan/R4 document and SO team input. You may be able to "copy and paste" information from these resources to the TERF.

Tab or scroll down to the next section.

Section B.4 - Performance Results

Section B.4 identifies and defines needs of the "Partner Organizations" and "Work Groups" that the Training Event proposes to address. It also organizes information (i.e., training needs) obtained in Step 1 of "Developing a Training Plan" (see earlier section of guide).

Section B.4 focuses on performance results of the identified Partner Organization or Work Group. The information required for this section (and the following sections) may be obtained from a needs assessment conducted formally or informally. If a needs assessment has not been conducted, the questions in this section can help you gather the required information. The terms "organization" and "institution" are used interchangeably.

> Refer to Link 3 in the TRC Workbook.

Section B.4a – Performance Results: Partner Organization(s)/Work Group(s)

A **Partner Organization** is any host-country group—formal or informal—that USAID has identified as a partner (major contributor) in achieving the identified IR/SO and for which performance needs have been identified. (What does the Partner Organization need to know or be able to do (better)?)

An organization may be formal or informal. A formal organization is most often an established and/or legal entity such as a ministry, department, association, university, etc.

An informal organization is usually a group of similar or disparate organizations, such as a task force on International Accounting Standards or a Parliamentary committee on promoting foreign investment, that organize for the short term on an *ad hoc* basis to work toward a common goal.

A **Work Group** is any unit(s) within a Partner Organization whose members will apply new or enhanced Knowledge, Skills, and Attitudes identified for the selected IR/SO. A Work Group is the organizational unit(s) in which the Knowledge, Skills, and Attitudes acquired during training will be applied.

In some instances, a Partner Organization is also the Work Group. For example, training needs could be identified for an entire association of accountants. The association, in turn, could have been identified as the major contributor to achieving the identified IR/SO.

In the text box, type in the name of the organization(s) identified. Provide brief background on the role and responsibility of the organization and the organization type. If trainees for the event will be selected from more than one organization, include all appropriate organization names and related information.

Type in the specific Work Group(s) where the Knowledge, Skills, and Attitudes will be applied and where the most immediate performance improvement will be achieved; for example, the International Accounting Department (Work Group) of the University of Business Management (Partner Organization) and the Association of Accountants (Partner Organization and Work Group). More than one Work Group may be involved.

Refer to Exercise 5 in the TRC Workbook.

Tab or scroll down to the next subsection.

Section B.4b - Performance Results: Performance Needs

Once the Partner Organization and Work Group have been identified, the performance needs to be addressed by the Training Event must be defined. Performance indicators that assess the training application also need to be identified for the Work Group. (A general needs assessment and identification may be found in the Mission's Strategic Plan and R4 documents.)

Information for Section B.4b can be developed after the following questions have been answered:

- What Partner Organization(s) contribute to achieving the IR?
- What does the Partner Organization need to know or be able to do (better)?
- What parts of the organization (i.e., Work Group) need to function differently or better?
- What improvements or changes are expected?
- How will you know when the performance problem has been addressed? What are the performance indicators? (For example, International Standards of Accounting in X number of regions are to be developed and executed by the year XXXX. Work Unit A in Partner Organization 1 must be capable of applying International Accounting Standards in the workplace.)

Specify how the institution will benefit from improved performance as a result of the Training Event. The *focus is on the performance needs of the institution* and how the individuals selected for training will address those needs. (For example, an improved/new curriculum on International Accounting Standards needs to be developed by the accounting faculty from the University of Business Management, International Accounting.)

Refer to Exercises 6 and 7 in the TRC Workbook.

Tab or scroll down to the next subsection.

Section B.4c – Performance Results: History of Assistance

In the text box, type in additional and specific information on the organization. Answers to the following questions should be included:

- What is the history of assistance to the Partner Organization?
- To the Work Group?
- What other USAID assistance has been or will be provided to the organization?
- What other donor assistance has been or will be provided to the organization?

Provide a short history of support provided to the organization, including previous and complementary USAID support and support from other donor groups. Contact information on the organizations providing support (including USAID) is helpful.

Refer to Exercise 6 in the TRC Workbook.

Tab or scroll down to the next subsection.

Section B.4d - Performance Results: Other Interventions and Inputs

In the text box, type in additional and specific information on the Partner Organization. Responses to the following questions should be included:

- What other support activities are required to achieve the desired results?
- What other inputs are needed to support application of Knowledge, Skills and Attitudes?
- If the Training Event is part of a series of events, how does it relate to those events? (Skip ahead to Section C for the definitions of "series" and then return to Section B.4d.) Indicate whether the Training Event will stand alone or whether an entire series of events must occur to support achievement of the identified IR.
- Are there several events that must occur (consecutively or concurrently) to optimize support for achievement of the IR/SO?
- What TA support, if any, is provided in support of the Training Event (pre- and post-training activities)?

- What types, if any, of in-country activities maximize (use of) Knowledge, Skills, and Attitudes acquired from the training?
- If the Training Event is U.S.-based or third-country training, what previous activities (TA, in-country training, conferences, and workshops) have already been provided?

Other types of inputs and interventions include (but are not limited to) policy dialogue, grants and loans, infrastructure, commodity procurement, technical assistance, and all types of training activities.

Tab or scroll down to the next section.

Section B.5 - Application of Knowledge, Skills, and Attitudes (KSAs) by Trainees

Provide the information requested in the text boxes. Be as precise, detailed, and specific as possible. The intent of Section B.5 is to describe the KSAs required to address the performance needs identified in Section B.2 (see also Step 1 of this User's Guide and the TRC Workbook for additional information and guidance).

While Sections B.3 and B.4 focus on the Partner Organization and Work Group, Section B.5 focuses on the trainee, specifically individual job performance and the expected results from participating in the proposed Training Event. Section B.5 assists with determining whether a single Training Event is sufficient to address the needs identified or whether a series of activities (for example, additional Training Events, TA) are required.

Responses in this section form the basis for Action Plans for trainees upon their return.

In the next section, you will develop Training Event objectives based on the KSAs identified and defined in this section. Sections B.5 and B.6 provide baseline measurements for exit and follow-on evaluations for individual trainees.

Section B.5a - Application of KSAs: Identification

How will performance needs/gaps of the Partner Organization(s)/Work Group(s) be addressed by individuals such as employees, officers, and/or others? What new or improved KSAs to be provided through training are required by these individuals to support change in Partner Organization(s)/Work Group(s)? Responses to the preceding questions should be entered in the text box.

Refer to Exercise 7 in the TRC Workbook.

Tab or scroll down to the next subsection.

Section B.5b - Application of KSAs: Application on the Job

Enter information in the text box by answering the following:

- What do trainees need to do or do better within the work unit?
- What will individual trainees be responsible for in terms of improved work output or product quality? For example,
  - more efficient use of existing or new equipment?
  - implementation of new policies or organizational structure?
  - new or improved operating systems? (For example, designing new curricula on International Standards of Accounting or conducting five training sessions on adult teaching methodologies for university faculty.)

In some cases, the information may be the targets and indicators identified in the R4 document. Sections B.5a and B.5b may seem redundant and may even be combined if desired. However, Section B.5a refers to the Partner Organization/ Work Group needs of individuals to be addressed by trainees while Section B.5b refers to how trainees are expected to apply newly acquired KSAs.

Refer to Exercise 7 in the TRC Workbook.

Tab or scroll down to the next subsection.

Section B.5c – Application of KSAs: Enabling Environment

Enter information in the text box by answering the following:

- What is necessary in the work environment for trainees to apply their newly acquired KSAs?
- For trainees to apply the KSAs acquired from the Training Event, how must the work environment be modified to enable performance changes at the level of the individual, the work unit, and the organization (for example, new policies and procedures, appropriate equipment, adequate supplies, supervisory and management support, interpersonal relationships, organizational roles and responsibilities, etc.)?

The work environment must enable—neither hinder nor inhibit—performance improvement.

Refer to Exercise 9, Item 3, in the TRC Workbook.

Tab or scroll down to the next section.

Section B.6 - Objectives of Training Event

In the text box, enter a list of expected, measurable, and achievable outcomes of the Training Event. Optimally, what specific KSAs must the trainees acquire from the Training Event in order to contribute to the achievement of the IRs identified in Section B.2?

Objectives may include specific outcomes described in the Strategic Plan or R4 document, such as

- creating new university curricula on International Standards of Accounting;
- defining International Standards of Accounting and related terms;
- preparing materials for an in-country workshop for faculty on knowledge and skills acquired from training; and
- establishing in outlying areas continuing education seminars on International Standards of Accounting.

As you draft these objectives, remember that the average length of Training Events is three to four weeks. Objectives must not only be measurable, they must also be achievable during the time period estimated for the Training Event.

An illustrative list of measurable terms is included in Appendix A.

Refer to Link 6, Exercises 10 and 11, in the TRC workbook.

Tab or scroll down to the next section.

Section B.7 - Training Event Components/Follow-On Activities

Section B.7a. Training Event Components. Position the cursor in the box and type in recommendations for Training Event components. Components might take the form of role plays, case study presentations, hands-on use of computers and software, observational study tours of model programs, networking opportunities, training-of-trainers (TOT) sessions, internships, university seminars and courses, attending a related conference, etc.

Refer to Exercise 8, Item 1, in the TRC Workbook.

Select one or more training components and type in the information.

Section B.7b. Projected Follow-On Activities. In this text box, you may enter expected follow-on activities that will support the application of newly acquired KSAs and reinforce lessons learned. Information in this section allows those concerned to begin thinking about and planning such activities.

Tab or scroll down to the next section.

Section B.8 - Funding Priority of Training Event

To view the list of funding priorities, point and click on the down arrow.

Training Events considered *essential* are labeled "A"; those considered important or desirable but not essential are labeled "B."

> For those developing the entire Training Plan for each specific IR/SO, rank all recommended A-priority Training Events from #1 through #3, with #1 of highest priority. An A1 training activity is considered vital to the successful achievement of the IR/SO. Each IR/SO could have at least three A-priority Training Events.
>
> Training Events that are important or desirable but not vital are labeled "B" and ranked from #1 to #3, with #1 of highest priority. Such events are considered if funds are available after all A-priority events have been funded.
>
> In the case of more than three "A" events and/or three "B" events, type in the priority alpha and number in the text box labelled "Additional Priorities."
>
> It is assumed and recommended that a senior management team, including the Mission's designated Training Officer, will screen all proposed Training Events for each IR/SO and, depending on funding, prioritize those recommended for the Mission's final Training Plan (i.e., that signed and approved by the Mission Director).

Select the priority for your Training Event by clicking on the appropriate selection.

Refer to Exercise 8, Items 2 and 3, in the TRC Workbook.

Tab or scroll down to the next section.

Section B should appear as below.

Section B: Intended Results

Save Document

Please save your Work

Requests for information in this section may seem duplicative. This is intentional as part of the thought process to create a Training Event for results and impact.

B.1 Provide brief background on SO(s) selected.

1.1 Increased transfer of state-owned assets to private sector.

1.2 Increased soundness of fiscal policies and fiscal management practices.

Help!

B.2 Intermediate Results (IR)

Enter relevant IR (s), number and text as given in Mission's most recent R4 document.
Enter all IRs supported by this Training Event, use the language in Mission's approved R4 document.

IR Number:

Help!

B.3 Performance Indicators, Baselines, Targets

Enter the Performance Indicators, Baselines, and Targets identified by SO teams.

Help!

B.4 Performance Results

Help!

a. What organization(s) does this Training Event support? What work units in the organization does this Training Event Support?

Help!

b. What are the performance problems that this training will address? In the work unit, what are the indicators of performance?

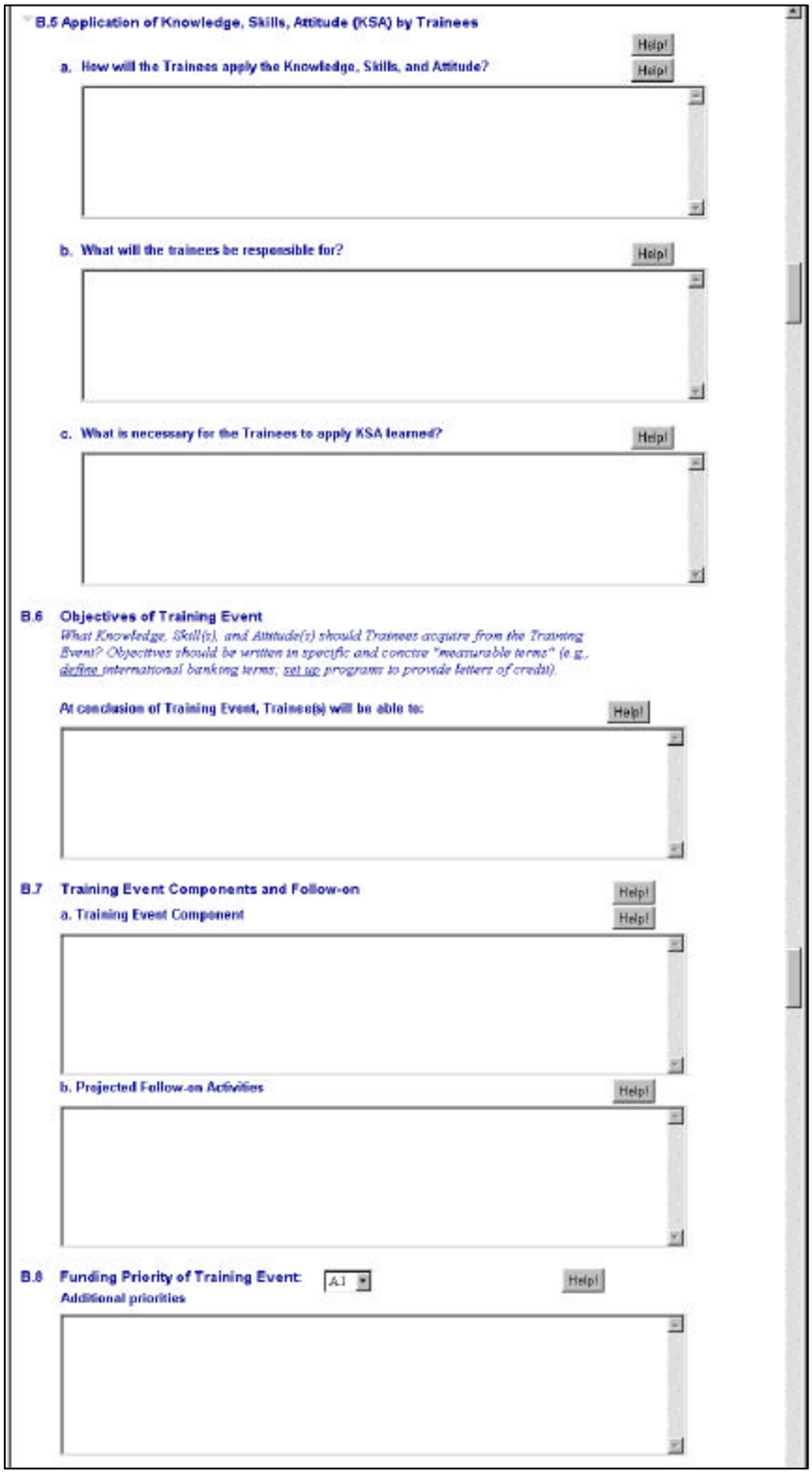
Help!

c. What is the history of assistance to this organization? To the work unit?

Help!

d. What other support activities are required to achieve desired results?

Help!



B.5 Application of Knowledge, Skills, Attitude (KSA) by Trainees

Help!

a. How will the Trainees apply the Knowledge, Skills, and Attitude? Help!

b. What will the trainees be responsible for? Help!

c. What is necessary for the Trainees to apply KSA learned? Help!

B.6 Objectives of Training Event

What Knowledge, Skill(s), and Attitude(s) should Trainees acquire from the Training Event? Objectives should be written in specific and concise "measurable terms" (e.g., define international banking terms; set up programs to provide letters of credit).

At conclusion of Training Event, Trainee(s) will be able to: Help!

B.7 Training Event Components and Follow-on Help!

a. Training Event Component Help!

b. Projected Follow-on Activities Help!

B.8 Funding Priority of Training Event: A.1 Help!

Additional priorities

Remember to save your work by pointing and clicking on the "Save" icon.

SECTION C—TRAINING EVENT

Section C.1 – Training Management

Section C.1 focuses on issues the Mission's training implementation contractor must address if the contractor is to design and monitor Training Events in accordance with all the information provided in the TERF, comply with USAID policies and procedures, and contribute to the achievement of IRs/SOs. Remember that training implementation contractor staff and training providers located outside the country may not be aware of the current country situation.

Refer to Exercises 8, 13, 15, and 16 in the TRC Workbook.

Position the cursor in the box and enter any information that must be taken into consideration in the design and delivery of the Training Event. Examples include the following:

- The training provider must be knowledgeable about the recent economic and political situation in trainee's country (provide this information in Section D as well).
- The training provider must provide course materials in both English and the host-country language before the event. How far in advance?
- The trainees exhibit something special or unique. Do they require basic skills and knowledge? Do they require enhancements to lessons already provided?
- An intermediate (or advanced) curriculum is more suitable for trainees.
- A training-of-trainers fundamentals module must be included to share lessons learned with colleagues (emphasize this requirement in Section B.7).
- The Training Event is an "off-the-shelf" course and/or is offered only at certain times of the year.
- The Training Event is part of a series of training activities (describe).

Tab or scroll down to the next section.

Section C.2 - Suggested Event Title

After completing Section B, you may wish to revise the Training Event title entered at the beginning of the TERF. You may also leave the title as is.

Should you decide to edit or change the title, position the cursor within the box and enter a new/edited title. Be descriptive and brief, using commonly known abbreviations and acronyms (mgt. for management, priv. for private/privatization, BLS for U.S. Bureau of Labor Statistics, etc.). (Check to see that any changes are also entered at the top of the TERF.)

Note. While the TERF does not limit the length of the Training Event title, only the first 30 characters can be listed on the TEOL repository screens.

If the Training Event is part of a series or one of several offerings under the same event, please indicate as such in the Training Event title.

- If the event is one of several activities that must be taken in a given sequence—e.g., in-country workshop followed by a U.S.-based Training Event followed by an in-country follow-on activity—you are encouraged to designate it as such in the title. For example, the in-country activity could been entitled "IC Accounting" to be followed by the U.S.-based event entitled "U.S. Accounting" to be followed by the in-country follow-on activity entitled "IC Accounting Follow On." You should also describe the sequential nature of the series in Section C.1 – Special Considerations.

- If the *same course* is to be offered *several times* to accommodate a large number of trainees—e.g., International Standards of Accounting (ISA) offered five times for groups of 20 to provide basic skills for 100 members of the National Accountants Association—you are encouraged to note that there are to be five offerings of the same event. For example, ISA-Group 1 of 5, ISA-Group 2 of 5, ISA-Group 3 of 5, ISA-Group 4 of 5, and ISA-Group 5 of 5. Again, make the necessary notations in Section C.1 – Training Management.

Tab or scroll down to the next section.

Section C.3 -Training Venue

USAID-funded training events may take place **In-Country,** in the **United States**, or in a **Third Country**. One, two, or all three sites may be selected as required by pointing and clicking on the box(es) located to the left of each option.

If **Third Country** is selected, enter the proposed country (if known) in the text box labeled **Third Country**. If there is more than one **Third Country**, type a comma between each country identified.

> Refer to the appropriate sections in ADS 253 and the E&E Participant Training Manual, which are on the E&E training website. Contact the training implementation contractor for additional assistance and guidance for approved USAID Third-Country training sites.

Tab or scroll down to the next section.

Section C.4 - Type of Course

Select the type of course by clicking on the appropriate circle to the left of "New Event," "Repeat Event," or "Modification of an Event previously funded." You may select only one option.

If the Training Event is a "Repeat Event" or a "Modification of an Event previously funded," enter the requested information in the boxes following the type of courses.

Sector	Was the course in Economic Restructuring? Democracy?
Course Title	Type in the name of the earlier course (you may need to check with your training implementation contractor for this information).
Training Event Code	Enter any identifying code (you may need to check with the Mission's training implementation contractor for this information).

Tab or scroll down to the next section.

Section C.5 - Training Is to Begin

Select the ideal "Quarter" and "FY" (Fiscal Year) for the Training Event by pointing at the down arrow and clicking. Select the recommended Quarter and FY. Please be aware that there may be occasions when the Quarter and/or FY need to be changed.

In the next box, "Training duration in weeks," type in the ideal number of weeks for the Training Event. Enter the figure itself (2, 4, 6, etc.), not the word (two, four, six, etc.). If there is a specific date for the event in the case of an off-the-shelf course or an advertised seminar, provide this information in Section C.1 – Training Management.

> Reminder. Biographical data forms for each proposed trainee should be received at least three months before the start of any Training Event, especially for U.S.-based training.

Tab or scroll down to the next section.

Section C.6 - Number of Trainees to Attend Event

Point and click on the respective boxes and then enter the approximate number of trainees by gender. The computer totals the number when you move to the next section.

> Reminder. Agency goal—50 percent female participation in USAID activities. Cost-containment consideration—for U.S.-based training, larger groups (14 to 20 trainees) per activity are preferable.

Please note that the computer automatically furnishes you with the percent of female trainees when you have completed Section C.6. Under Section C.1 –Training Management, please indicate reasons for gender selection if it falls below 50 percent female participation.

When you are in Section C.7. take a minute to review Section C.6 to confirm that the computer has totaled the trainee numbers and provided a percent.

Section C.7 - Suggested Training Providers to Receive RFTPs

In this box, provide the name(s) and contact information for any organizations/ institutions that you are aware of that are capable of providing the Training Event. The training contractor will then be able to include such organizations on the list of recipients when the Request for Training Proposals (RFTPs) is distributed.

> Note. While all suggested training providers will be sent RFTPs, one or more may not be among the top three recommended to the Mission for final selection.

For purposes of the tutorial, type in the name of your Mission's training implementation contractor or the name of a training provider (if known).

Tab or scroll down to the next section.

Section C as it appears in the TEOL follows:

Section C: Training Event

Save Document

Please save your Work

C.1 Training Management

Issues or concerns that must be taken into consideration in either the design or the delivery of this training activity. Help!

C.2 Event Title Help!

C.3 Training Venue: Help!

☐ In Country ☐ US ☐ Third Country

Third Country:

C.4 Type of Course: Help!

○ New Event

○ Repeat Event

○ Modification of an Event previously funded

Sector:

Course Title:

Training Event Code:

C.5 Training is to begin the 1st **Quarter of FY** 1999 . Help!

Training duration in weeks:

C.6 Number of Trainees to attend Event Help!

Males:

Females: **0.0%** *USAID goal is 50% female participation.*

Total:

C.7 Suggested Training Provider to Receive RFTPs (if any) Help!

(please provide contact information)

*** * *If this is an academic event, skip ahead to Section F.* * ***

Remember to save your work by pointing and clicking on the "Save" icon.

SECTION D—BACKGROUND/SUPPORTING INFORMATION

In this box, enter additional details that will help in the design and presentation of the most suitable and appropriate training activity. Details might include a brief summary of the country's economy, political situation, geography, people, customs and/or language, and most recent current events.

> Reminder. Training providers (especially those in the United States and/or third countries) may not be fully knowledgeable of current events, situations, or the environment under which the participants work and live.

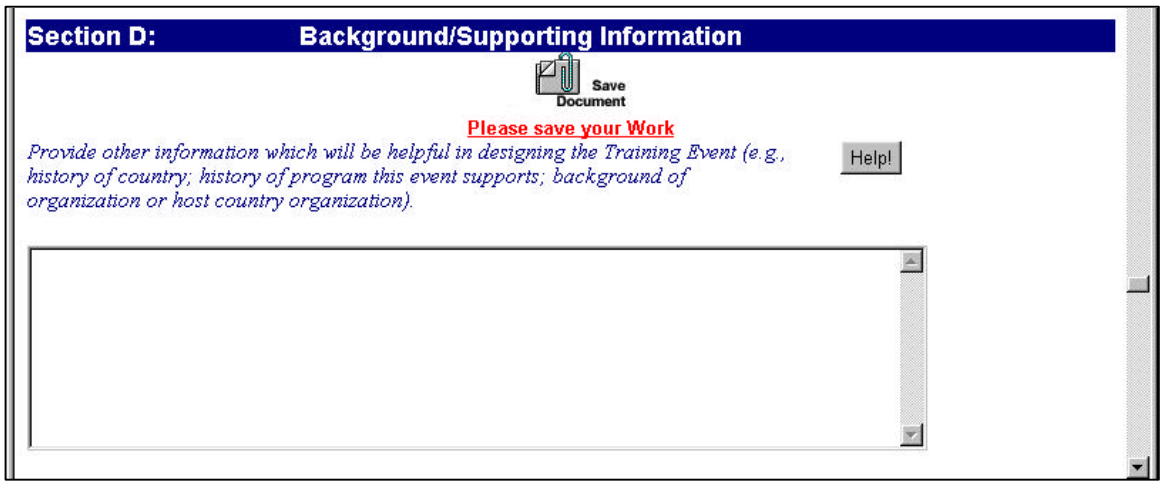
Other supporting information may include additional contacts for supplemental information or clarification as well as information on all TA projects affected by the training request, including but not limited to project title, TA contract number, length of program, and funding citations.

As appropriate, include pertinent sections from the Strategic Plan/R4 document and other sources—either enter the text or refer the reader to the source—that will be especially helpful to training providers who may not have access to or be aware of available background/supporting information resources. If the R4 or other documents are computer-resident at your Mission, you may be able to copy and paste appropriate sections to save typing time; check with the Mission's computer specialist.

Position the cursor within the box and type in any pertinent information.

Tab or scroll down to next section.

Section D as it appears in the TEOL follows:



Remember to save your work by pointing and clicking on the "Save" icon.

SECTION E—TRAINEE PROFILE

Section E.1 - Criteria for Candidate Recruitment and Selection

Select relevant criteria by pointing and clicking on all appropriate boxes (you may select more than one). If you select "Other" or can provide more information on the other options selected, move the cursor into the text box labeled "Explanation" and type in the information, e.g., "candidates must be active, current members in a local (provide name) NGO" or "candidates must be employed as (give position) at/by (identify the institution/organization) if IR indicators are to be met."

Refer again to Exercises 5, 6, and 7 in the TRC Workbook.

Other desired qualifications of potential candidates—for example, recommended institutional/organizational/professional affiliations, education, and/or areas of expertise and experience—may be highlighted in the second text box. Position cursor within text box and type in relevant information.

Refer again to Exercises 5, 6, and 7 in the TRC Workbook.

Details on prospective trainees result in a Training Event better tailored to trainee needs. This section also forms the framework for a Stakeholders' Agreement. (See Appendix B for a sample Stakeholders' Agreement.)

> Reminder. ADS 253 (Section 253.5.2) provides guidance on candidate identification and selection.

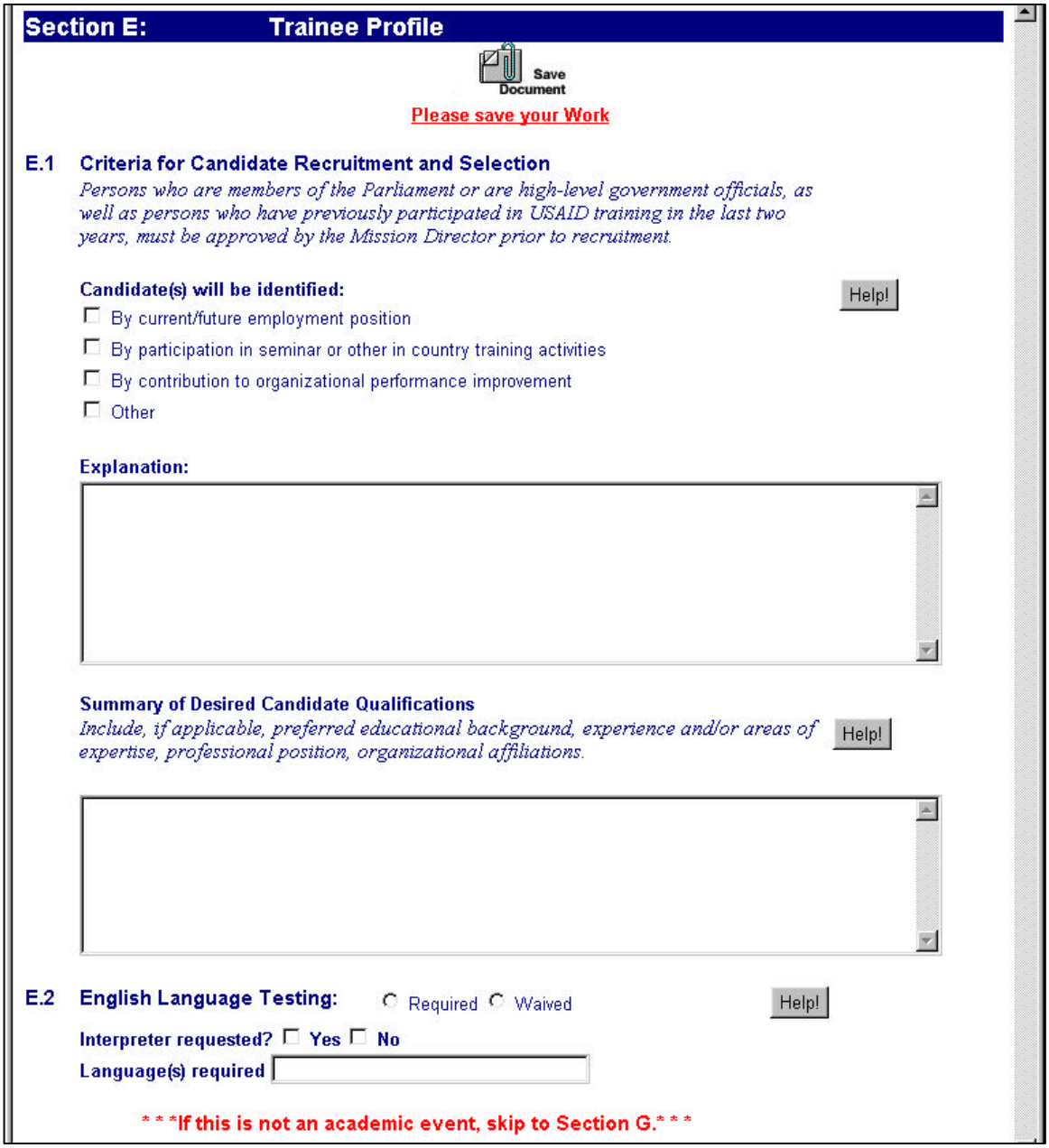
Tab or scroll down to the next section.

Section E.2 - English Language Testing

Click on the appropriate circle to indicate whether English language testing will be required or waived for the Training Event.

If English is required, USAID regulations require each prospective trainee to take an English test. Confer with the training implementation contractor for additional information and refer to ADS 253, Section 253.

Regardless of whether English is required or waived, IF an interpreter is desired, please click on the box preceding "Yes" after "Interpreter." Then move your cursor to the text box and type in the preferred language(s). If no interpreter is required, click on the box preceding "No." For this tutorial, point and click on the circle preceding "Waived" and then select "No" at Interpreter.



Section E: Trainee Profile

Save Document

Please save your Work

E.1 Criteria for Candidate Recruitment and Selection

Persons who are members of the Parliament or are high-level government officials, as well as persons who have previously participated in USAID training in the last two years, must be approved by the Mission Director prior to recruitment.

Candidate(s) will be identified: Help!

- ☐ By current/future employment position
- ☐ By participation in seminar or other in country training activities
- ☐ By contribution to organizational performance improvement
- ☐ Other

Explanation:

Summary of Desired Candidate Qualifications Help!

Include, if applicable, preferred educational background, experience and/or areas of expertise, professional position, organizational affiliations.

E.2 English Language Testing: ○ Required ○ Waived Help!

Interpreter requested? ☐ **Yes** ☐ **No**

Language(s) required

*** * *If this is not an academic event, skip to Section G.* * ***

Remember to save your work by pointing and clicking on the "Save" icon.

Section F is filled out IF the Training Event is academic training. If the Training Event is not academic training, go directly to Section G. For this tutorial, however, scroll through Section F to familiarize yourself with the information requested.

SECTION F-ACADEMIC TRAINING

Section F.1 - Type of Academic Program

Select the type of academic training: "Associate's Degree," "Bachelor's Degree," "Master's Degree," "Ph.D. Program," or "Other." If "Other" is selected, provide additional details in the box labeled "Explanation." ("Other" may include certificate programs, special offerings, etc.)

> Note. This section will be revised as needed as more academic Training Events are requested. Please send your recommendations to the website administrator.

Tab or scroll down to the next section.

Section F.2 - Course of Study

Enter details of the academic training requested. Include major area of study (e.g., master's degree in business administration) and length of program (e.g., 18-month master's degree program) by positioning the cursor in the box and typing in the required information.

Tab or scroll down to next section.

Section F.3 - Minimum Qualifications

Enter the minimal trainee qualification(s) for participation in the Training Event (e.g., SAT or GRE scores, English proficiency, undergraduate record, etc.).

Tab or scroll down to next section.

Section F.4 - Suggested Academic Institution

Enter the suggested academic institution, if known. Indicate whether the applicant has been accepted at the institution (if selection has taken place).

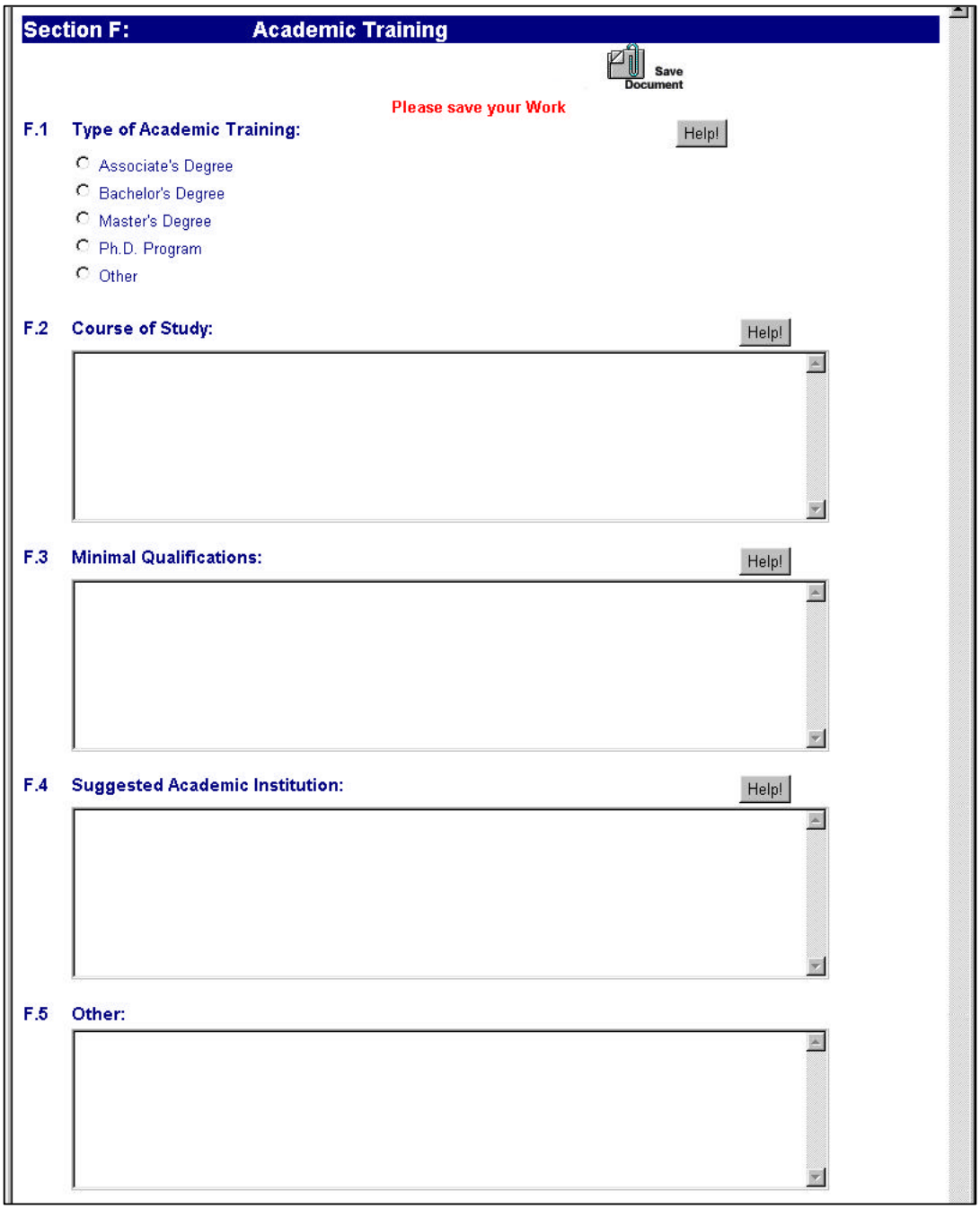
> USAID has ceilings for tuition; refer to the appropriate ADS 253 chapter.

Tab or scroll down to the next section.

Section F.5 - Other

Enter any other supporting information or details relating to the academic Training Event.

Tab or scroll down to the next section.



Section F: Academic Training

Save Document

Please save your Work

F.1 Type of Academic Training: Help!

- Associate's Degree
- Bachelor's Degree
- Master's Degree
- Ph.D. Program
- Other

F.2 Course of Study: Help!

F.3 Minimal Qualifications: Help!

F.4 Suggested Academic Institution: Help!

F.5 Other:

Remember to save your work by pointing and clicking on the "Save" icon.

SECTION G—COST ESTIMATES

Section G.1 - Estimated Total U.S. $ Cost per Trainee

In this section, you may need to check with the Mission's Training Officer and/or training implementation contractor for assistance with U.S. dollar estimates.

Financial information is available ONLY to authorized users. Information in this section is not available to the general public (see section on "User Registration and Access.").

Enter estimated U.S. dollar amounts for the cost of the Training Event PER trainee. The Mission's training implementation contractor can provide assistance with cost estimates. The computer calculates and furnishes totals.

Instructional Cost	All costs associated with design/delivery of the Training Event
Trainee Cost	All costs directly associated with trainee expenses, including per diem and hotel
Travel Cost	International airfare, ground transportation (in-country, third-country, and/or U.S.)

Round up figures to whole dollar amounts; e.g., $1,000 rather than $999.50.

For purposes of the tutorial, enter your best "guestimates."

Reminder. USAID/E&E/EEUD cost containment guidelines remain in effect.

Tab or scroll down to the next section.

Section G.2 - Funding Source

Unlike the preceding section, Section G.2 asks for the TOTAL cost of the Training Event and for funding sources. The first part pertains to estimated USAID funds. Enter estimated U.S. dollar amounts (for the entire event) in the first column of

text boxes, again using whole dollar amounts. In the second column of text boxes, type in a description of the funding source. An example follows:

GTD	Description. Provide funding citation.
Contract	Description. Other USAID contract sources such as a technical assistance contract—one or more—and grants (provide funding citations). If there is more than one source, use the boxes labelled "Other" below.
Other	Description. Other USAID funding sources (e.g., performance awards, deobligation/reobligation monies).

The computer totals all USAID funds identified as funding sources for the Training Event.[14]

Other resources. The second part is other-than-USAID funding support. Enter funds provided by non-USAID sources, including cost sharing and in-kind contributions to support the Training Event. For cost sharing and in-kind contributions, estimate the U.S. dollar amount(s). The following examples are provided for the Description boxes:

Employer	Description, e.g., retains employee on salary while employee is in training (indirect cost of employee's salary), provides facilities for debriefing and training-of-trainer activities (in-kind).
Host Government	Description, e.g., provides international round-trip airline tickets for U.S.-based or third-country training (cost sharing).
Private	Description, e.g., trainees pay for all meals (cost sharing).
Training Provider	Description, e.g., training provider supplies all local transportation gratis (cost sharing).

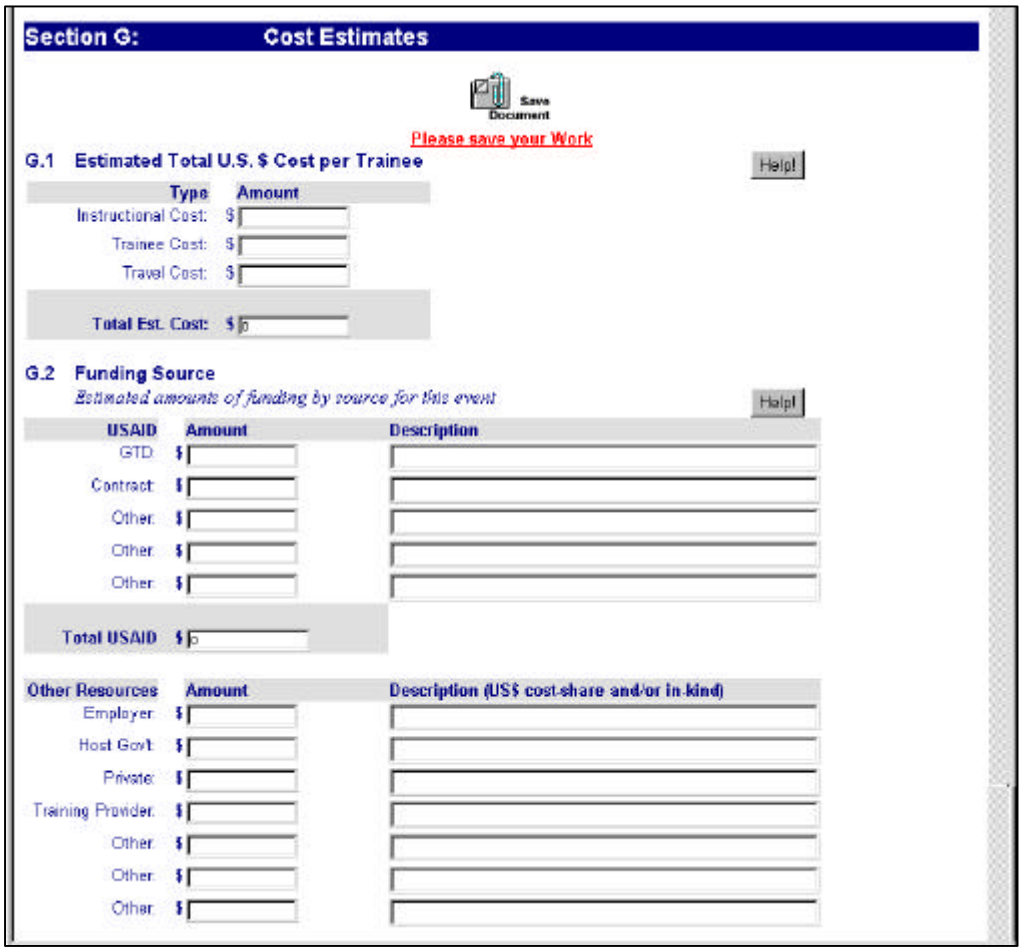
[14] E&E encourages the use of the TEOL/TERF for all USAID-funded training activities. The TERF can be used by TA contractors/grantees. For this section, they would skip the GTD text boxes and fill in the boxes marked "Contract" and "Other."

Other	Description, e.g., local government provides free workshop/ seminar space, local chamber of commerce sponsors networking opportunities (in-kind), other donors provide additional inputs such as computers.

The TEOL system totals both sources individually and provides a grand total. The figures will appear in the Summary Table.

For the purpose of the tutorial (and to demonstrate how the TERF works), please enter figures based on best "guestimates." You may return to edit your figures and/or enter new figures.

Tab or scroll down to the next section.

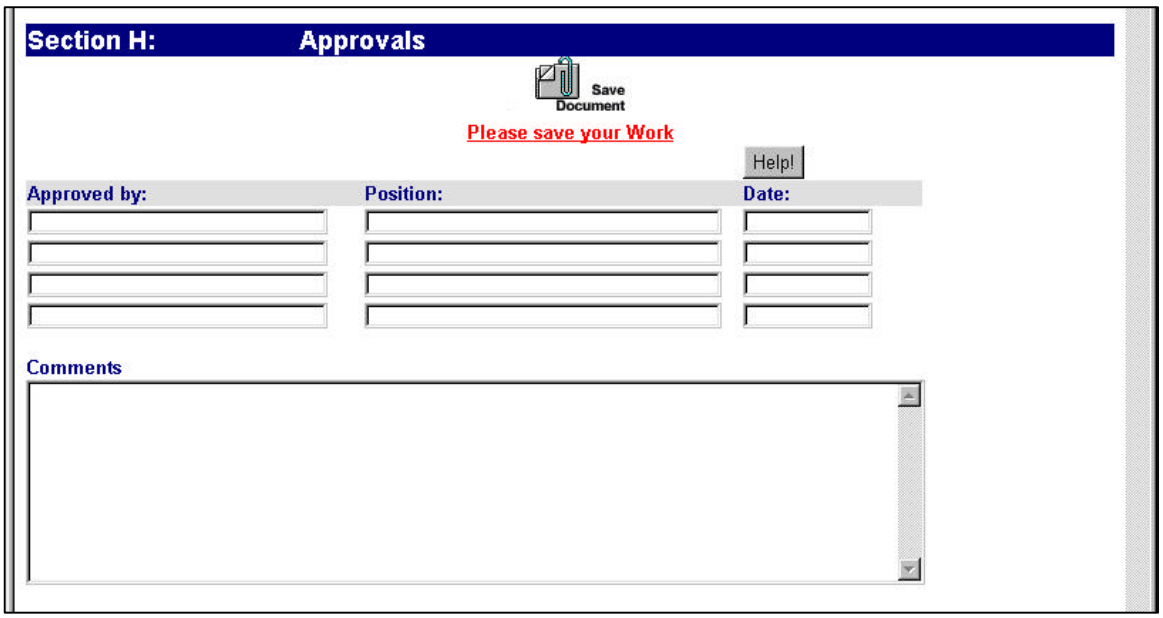


Remember to save your work by pointing and clicking on the "Save" icon.

SECTION H—APPROVALS

In the boxes, type in all USAID supervisors/managers who must review and approve your proposed Training Event (such as the SO team leader, Training Officer, office head, program officer, and/or Mission Director). List approvers from lowest to highest position; e.g., SO team leader, program officer, Mission Director.

A text box allows approvers to enter any explanatory notes or information regarding approval of the TERF.



When you are satisfied with the TERF you have developed and are ready to submit it for review and funding consideration, return to the top of the TERF document and click on the icon labeled **Propose**. Then advise those listed in Section H that the TERF is ready for review and approval. You may want to send an email to all listed approvers, asking that they send it on to the next recipient on the list.

> **Reminder.** Once the status of a TERF is changed from **Under Development** to **Proposed**, users with access level 2 will not be able to read or edit the document unless it is returned for revision. Be very certain that the TERF under development is ready for review before changing its status to **Proposed**.

After granting approval, approver(s) may initial over their name(s) on a hard-copy printout of individual Training Events and/or fill in the date of approval in the TEOL system to indicate approval of the TERF.

A TERF is considered **Approved** only when the highest-level approval has been given; this usually comes from the Mission Director (or designee).

> Note. Final approval by the Mission Director (or designee) may be indicated in this section (for the individual TERF) and/or in the Executive Narrative (approving the ENTIRE Training Plan). The latter (approval box in the Executive Narrative) is recommended. See **Appendix E** on Training Plan Development for details of the approval process.

When Training Event Request Forms are **Approved**, they make up the heart of the Mission's Training Plan. The Approved Training Event(s) may now be viewed by others in the Mission as well as by the Mission's training implementation contractor and others. The Training Plan can also be reviewed by AID/W, E&E regional Missions and offices, contractors, and others who have appropriate access-level passwords. (Refer to "User Registration and Access" in the Additional Tools and Other Information section.)

The Mission's Training Officer and/or training—human resources—committee reviews all TERFs with **Proposed** status and selects those to be recommended for funding. Should a TERF require more detail but is conditionally **Approved**, it will be sent back to the developer with the status of **Under Development-Previously Approved**.

All TERFs not selected will have their status changed to NOT APPROVED. (Refer to section on Status of TERFs later in the User's Guide. See Appendix E for additional details on preparing a mission training plan.

Mission staff responsible for training activities and/or the training implementation contractor, along with other designated senior management (an *ad hoc* training/ human resources committee), reprioritizes TERFs recommended for Approval**.** An Executive Narrative and Summary Table (see below) are prepared and may now be forwarded electronically (or by hard copy) to the Mission Director for funding approval. Once the Mission's Training Plan is **Approved**, the training implementation

contractor can begin to implement and monitor all **Approved** TERFs under the direction of the designated Training Officer. The **Approved** Training Plan may also be viewed online by contractors and USAID offices in Washington, D.C.

Executive Narrative. To append a transmittal/approval/summary document to the Training Plan, return to the TEOL repository site. Click on the blue hyperlink entitled "Executive Narrative." A text box appears. Position your cursor in the box and type a transmittal or summary cover document for submittal to the Mission Director for final approval of the Training Plan.

The Executive Narrative is a text box where the user may enter any or all of the following items (illustrative):

- brief overview of Mission portfolio;
- brief history of training in previous Fiscal Year;
- background such as a brief description of development of Training Plan/TERFs, including SO team involvement or approval process, history of training as a supporting resource input;
- highlights of Training Plan such as number of Training Events recommended by SOs, percent of funding by SOs, gender breakdown (and explanation if necessary), breakdown of in-country, third-country, or U.S.-based training, congressional earmarks or special setasides, comparison of GTD-funded activities and other USAID-funded training, other training activities in host country;
- other USAID-funded Training Events (i.e., non-GTD-funded) such as funding by TA contract/grant;
- a place for the Mission Director (or designee) to indicate approval of Training Plan (funding for all recommended TERFs); see below for more detail.

Recommendation/Approval Box (signature line for Mission Director). It is suggested that a hard copy of the Executive Narrative be printed for the signature of the Mission Director, indicating approval of the Training Plan (and funding of TERFs). The Training Officer should draft a recommendation/approval/ signature box within the Executive Narrative for this purpose. A copy should be kept in USAID files. Should the Mission Director review and approve online, typing in his/her name and date could indicate approval; however, a signed, hard-copy version should be retained.

The TEOL system is set up so that only one Executive Narrative per Mission per funding year (Fiscal Year) is allowed. Access is limited to users with access levels 3 and 4.

Mission's Summary Table. The TEOL is programmed to provide information in a spreadsheet format and is updated as TERFs are developed and/or edited and/or approved and/or not approved and/or cancelled. This function is available only to users with access levels 3 and 4. At present, the following data fields are displayed on the Table: Mission SO/IR; Event Title; UST/TCT/ICT; FY/Qtr; # of Trainees Planned/Actual; Actual M/F Trainees; Estimated Cost; AID Funding; Other Funding; HBCU/HSI; and TA Contractor.

For purposes of the tutorial, work with your Training Officer (or designee) to change the status of your document to **Approved** and then to **Completed** (refer to section on status levels). The change in status allows you to view Section I.

When an **Approved** Training Event has been implemented and participants have returned to the Partner Organization, the status of the TERF changes to **Completed.** Section I now appears on the TERF.

SECTION I—POST-TRAINING INFORMATION

Much of the information requested in this section can be provided by the Mission's training implementation contractor. Information requested is that of the actual Training Event. Section I also requests optimal dates for post-training evaluations (depending on availability of funds for evaluation activities).

Note. The TEOL system will be revised in CY 2000 to include an "Archive" button to prevent changes to a completed Training Event once Section I has been completed.

Section I does not appear until the Training Event status has been changed to **Completed**. While visible to all, this section is to be filled out only by those with "Manager" status, e.g., the training implementation contractor and/or the designated Training Officer.

Reminder. Section I, as well as all other sections except Section G, will be available for viewing by the general public once the status of a TERF has been changed to **Completed**. Users with access levels 3 and higher will be able to review and edit information as needed on the TERF before the status changes.

The following information appears in Section I:

I.1 Event Title	Type in the Training Event title.
I.2 Training Provider(s)	Type in the name of the training provider selected.
I.3 HBCU/HSI	If an HBCU or other Minority Serving Institution (i.e., Hispanic Serving Institutions and Tribal Colleges and Universities) has been selected, enter its name here.
I.4 Actual Dates of Event	Type in dates of the Training Event.
I.5 Actual Number of Trainees	Type in the number of males and females.
I.6 Brief Description of Training Event Outcomes and Results	Type in the requested information; you may want to refer to the training provider(s)' report(s) and/or contact the training implementation contractor for assistance.
I.7 Evaluation Schedule	Recommend an optimal time to conduct returnee evaluation of the Training Event, e.g., six, eight, or 12 months after trainees return.
I.8 Other	Type in any other details on the Training Event, especially those that would be of interest to colleagues and others in developing a Training Event.

Section I: Post Training Event

Save Document

Please save your Work

I.1 Event Title: Help!

Please include any relevant code numbers (e.g., PTP #) if applicable.

I.2 Training Provider(s):

I.3 If HBCU/HSI Provided U.S. Training, ☐ check here

I.4 Actual Dates of Event:

I.5 Actual Number of Trainees

Males	Females	Total

I.6 Please provide a brief listing/description of training outcomes.

(e.g., 5 Trainees received certificate of competency in international accounting standards; draft media public service announcement on AIDS produced; etc.)

I.7 Evaluation Schedule

When is the best time to conduct returnee evaluation on this event?

- ○ 6 Months after event
- ○ 9 Months after event
- ○ 1 Year after event
- ○ Other

Other:

I.8 Other

SAVING A COMPLETED TERF

Once you have completed a Training Event Request Form, *save your work* by clicking the **Save Document** icon located at the top and bottom of the TERF as well as after each section. Clicking on "Save Document" sends your work to the TEOL database where you may retrieve it later for editing or submission for funding consideration. When you attempt to exit a document, you will be asked if you have saved your work. If you have not saved the document, click on the button labeled "Cancel", which stops the exit operation. Then save your work. If you have saved your work, click on "OK" to exit. The TEOL system will return the user to the repository site.

It is recommended that you save your entries section by section, especially if power is periodically interrupted where you work. You may save your work at any time and return to it at any time to complete or edit it. The Status Bar located at the top of each new or developing TERF automatically shows the status **Under Development** in the upper right-hand corner of the computer screen. **Under Development** allows only the creator[15] of the event to edit and/or add more details and information.

You may access uncompleted TERFs by returning to the TEOL repository screen. (Did you remember to bookmark the site?)

Once you have saved your TERF, you may do one or more of the following:

- Print the document.

- Read/edit the Training Event Request Form. Should you wish to review or edit an event you have developed, return to the TEOL repository site (Training Event Request Forms by country and Mission SO screen). Locate the Training Event and double click on the event title to enter the document. (You may also use the menu on the left of the repository screen to view TERFs by Status to locate your event.)

[15] Members of an SO team who have requested and been assigned a common user name and password will be able to access and edit the TERF they are developing.

- The Training Event appears in the read-only mode. To make changes (additions, deletions), click on the icon marked **Edit Document** located at the top of the page. The document is now ready for editing.

> Note. The TERF system indicates the last date and time of access and the person entering/changing information. The information automatically appears at the top right of the first page.

Depending on your level of access, you may also read approved TERFs from other countries in the E&E region. You may not edit them, but you can copy events (see section below on "Additional Tools and Other Information").

- Develop another TERF. Begin the process again by returning to the TEOL repository and clicking on "Develop New Training Event" located at the upper left of the screen.

- Submit your TERF for funding. Change your TERF status to **Proposed** by clicking on the icon at the top of the first page of the TERF document. The screen returns to the TEOL repository and allows you to double click on it again to check if the status of your Training Event has changed. The TERF is now ready to be reviewed and approved by supervisors and senior management. Remember to advise your supervisors that you are submitting a TERF for funding consideration and approval.

- Send TERF by email to colleagues, partners, and associates (remember that formatting will disappear and only text will appear; ask your email recipients to concentrate on substance rather than style).

QUICK REVIEW OF TEOL/TERF PROCESS

The following steps outline the previous sections:

1. Access the Internet; go to E&E training website (www.enitraining.net)
2. On the Opening Page, locate the option to enter the TEOL database; enter TEOL
3. If you have received a user name and password, click on box labelled "Registered Users ENTER HERE"
4. Enter your user name and password; click "ok"
5. The "Country Mission Training Plans" screen will open (please note that only TERFs for your individual Mission will be listed; Your user name and password will "pull" up TERFs you are still working on—**Under Development**
6. To develop a new TERF, click on the blue hyperlink located on the menu on the left of the screen "Develop New Training Event"; to edit a TERF already **Under Development**, locate the event title from the list and double click on it
7. A blank TERF will appear; please note the icons at the top of the screen
8. On the first line "Event Title," enter a title if you have one in mind
9. Start with Section A and proceed to Section H until you are ready to change the status of the **Under Development** TERF to **Proposed**
   - Section A.1. (1) confirm country name; (2) select a Mission and/or E&E Strategic Objective
   - Section A.2. Enter names and contact information for the USAID staff person responsible for the TERF under development
   - Section A.3. Enter names and contact information for primary and other technical assistance/TA contractors/grantees
   - Section A.4. Enter name and contact information of person(s) who will have additional details on the TERF and will implement training activity (e.g., training implementation contractor)
   - Section B.1. Type in background and other relevant information on the SOs selected
   - Section B.2. Enter the IR number(s) the TERF is to support; in the text box, enter the text of the IR(s) listed and provide any other details
   - Section B.3. Enter information on performance indicators, baselines, and targets
   - Section B.4a. Enter performance results (i.e., KSA needs of the Partner Organization and Work Group)

- Section B.4b. Enter information on how the acquired KSAs will be applied in the Work Group
- Section B.4c. Enter a history of assistance to Partner Organization(s) identified for training support
- Section B.4d. Enter training support programs and activities and/or inputs needed to optimize application of KSAs
- Section B.5a. Enter information on how trainees will apply KSAs acquired from the training activity
- Section B.5b. Enter information on indicators that trainees are applying acquired KSAs
- Section B.5c. Enter information on what is needed in the Partner Organization(s) and Work Group(s) to support trainees
- Section B.6. List measurable and achievable objectives of Training Event
- Section B.7a. Enter recommendations for Training Event components such as internships, observational study tours, role plays, etc.
- Section B.7b. Enter information, if applicable, for recommended follow-on activities; identify where and when activities are to take place
- Section B.8. Click on pull-down arrow and identify funding priority for the TERF
- Section C.1. Enter information on what will be expected/required of the selected training provider
- Section C.2. Enter event title (you may edit the title previously entered or type in a new title)
- Section C.3. Select whether the Training Event will be in-country and/or third-country and/or U.S.-based (you may select one, two, or three sites)
- Section C.4. Indicate whether the Training Event will be a New Event, a Repeat Event, or a Modification of an Event previously funded by clicking on the circle preceding your selection (for a modified event, enter information on sector, course title, and Training Event code if known/available)
- Section C.5. Identify recommended time for Training Event to begin by clicking on the pull-down arrows and selecting one of the menu options listed for both Quarter and FY (fiscal year)
- Section C.6. Enter the estimated number of males and estimated number of females expected to attend Training Event
- Section C.7. If known, enter suggestions for Training Providers—and contact information—to be sent the Request for Training Proposal (RFTP)

- Section D. Enter additional information that will assist the training implementation contractor as well as the training provider in designing and providing the most appropriate Training Event
- Section E.1. Select one or more of the listed criteria by clicking on the circle preceding your choice(s); in second text box, enter information on other criteria to be considered
- Section E.2. Identify whether English will be "waived" or "required" by clicking on the circle preceding your choice
- Section E.3. Even if English is to be "required," an interpreter may be required—click on Yes or No; enter language(s) in text box
- Section F. If the Training Event is academic, complete this section
  - F.1. Select type of academic training by clicking on circle preceding your choice
  - F.2. Enter details on the course of study
  - F.3. Enter minimum qualifications of candidate
  - F.4. If known, enter information on suggested academic institutions; if candidate has been selected by an academic institution, include that information here
  - F.5. Enter any other relevant information
- Section G.1. Enter estimated U.S. dollar costs PER trainee in three categories: Instructional Cost, Trainee Cost, Travel Cost
- Section G.2. In first part, enter USAID funding sources (GTD, TA contract/grant, other); in second part, enter other sources of funding (employer, host government, private, training provider, other)
- In the text boxes in Section H, enter the names of supervisors who must approve the TERF, their positions, and date of approval. Change the status of the TERF to **Proposed** when you are satisfied with the document (system will return to repository site, select TERF again). Advise supervisor(s) that the TERF (give title of TERF) is ready for their review and approval

10. When a Training Event has been provided and participants return to their Work Group(s), the status of the TERF must be changed to **Completed** (system will return to repository site, select TERF again); Section I will now appear
    - Section I.1. Type in the final Training Event title
    - Section I.2. Type in the name(s) of the training provider(s) selected
    - Section I.3. If the training provider is an HBCU or other minority serving institution (i.e., Hispanic Serving Institutions and Tribal Colleges and Universities), enter the name here
    - Section I.4. Type in the actual date the Training Event took place

- Section I.5. Type in the actual number of males and females who attended the Training Event
- Section I.6. Enter information on outcomes and results of the Training Event (remember this information will be available to the general public)
- Section I.7. Type in date(s) of any evaluation(s) recommended
- Section I.8. Type in any other relevant information (remember that this information will be available to the general public)

REMEMBER TO SAVE YOUR WORK SECTION BY SECTION AND BEFORE YOU EXIT YOUR DOCUMENT. With any change in status or upon exiting from a document, the TEOL system automatically takes the user back to the repository site.

ADDITIONAL TOOLS AND OTHER INFORMATION

User Registration and Access. To access the E&E website and use the TEOL/TERFs programs, you will need a user name and password that are assigned by a Mission's staff person responsible for training (i.e., Training Officer). Individual Missions determine appropriate access levels for their staff and country users such as TA contractors/grantees.

The following access levels have been developed:

- Access level 1 (Reader). Users may only read **Completed** Training Events. They cannot develop or edit TERFs. Users include the general public or anyone with access to the Internet. No user name or password is required. (Users at this level enter the TERF program by clicking on the ENTER TEOL icon located on the opening page of the TEOL.)

- Access level 2 (Author). Users may develop TERFs for assigned programs, read and edit events they have developed, change the status of TERFs from **Under Development** to **Proposed,** and read **Approved** TERFs from throughout the Mission and Completed Training Events for Missions throughout the E&E region. Typical users include project officers and TA contractors; they are considered "authors."

  An SO team may request a common user name/password so that team members may develop TERF(s) collaboratively.

> Note. Once an author changes the TERF status from **Under Development** to **Proposed**, the author will not be able to edit the document (unless the Training Officer or someone with editor status returns it for revision).

- Access level 3 (Editor). Users may develop, edit, and read TERFs within their specific Mission, change the status of individual TERFs from **Under Development** to **Proposed,** and read **Approved** TERFs from throughout the assigned Mission and **Approved** Training Plans for Missions throughout the E&E region. Users who work with more than one Mission (e.g., training implementation contractors in the field and in Washington, E&E/EEUD staff in Washington) have access to TERFs that are **Under Development** throughout the

E&E region. Other typical users include SO team leaders, office directors, and staff members who are part of the approval process for TERFs. They are considered "editors," and, in addition, can read Executive Narratives and Summary Tables.

- Access level 4 (Manager). Users may develop, edit, and read TERFs from throughout an assigned Mission. They are responsible for the status of all Mission TERFs, assign user IDs and access levels, finalize approved Training Plans for the assigned Mission, and may read all approved Training Plans from throughout the E&E region. Users at this access level include the Mission staff responsible for training programs (the Mission's designated Training Officer) and other designated senior management in the field and in USAID/W, including E&E/EEUD and its training implementation contractors. Users at this level are considered "managers," and are responsible for drafting the Executive Narrative and maintaining status level changes of all TERFs. Additionally, level 4 users can view data presented on the Summary Tables.

Developing a Training Event for two or more countries. You may use the **Copy Document** icon to duplicate any TERF. Every country participating in a Training Event must have its own TERF just as each country has its own individual funding citations and reporting mechanisms.

On the primary or selected TERF, locate the copy icon (top of screen). Click on it, then click on the "Edit" button. Remember to make changes as needed, such as country name (Section A.1), number of trainees (Section C.6), and cost estimates (Section G), and to create a title in Section C.6 indicating that the event is intended for trainees from more than one country.

Example: Acc99-KZ; Acc99-TJ; Acc99-Uz

You may also use the **Copy Document** icon to copy other countries' TERFs that are appropriate for meeting performance gaps identified in your Mission. Again, you need to make appropriate changes to an event so that it is specific to your Mission needs (see the section below for detailed directions on copying).

Copy Document. The Copy button creates an identical copy of a Training Event. Once a document is copied, changes can be made to the TERF and a new Training Event can be developed and saved. The

copy then becomes completely independent of the original TERF such that a user does not have to re-enter individual bits of information multiple times. To use the copy function, follow these steps:

1. Open the Training Event to be copied.
2. Put the Training Event in Edit mode and click on the Copy Document button. The current Training Event is then automatically saved and closed.
3. A new copy of the Training Event is developed and opened in Edit mode. A reminder that the document is a copy is posted at the top of the TERF.
4. Make any changes to the copy before saving. Once the document is saved, the title of the new copy includes the text "(Copy of)" in the title box.
5. Before closing the copy, rename the Training Event to exclude the "Copy of" text—go to Section C.2. Regardless of the status of the original Training Event, the new copy always defaults to **Under Development** status.

Preparing the Training Plan for Approval. Mission staff responsible for training programs assemble all TERFs with **Proposed** status and review them with Mission leaders (e.g., SO team leaders) and others (e.g., training implementation contractors, TA contractor) for final prioritization for GTD funding (i.e., a Mission *ad hoc* training or human resources development committee).

Reminder. Additional details and guidance are provided in Section E.

An *ad hoc* Training Event Selection Committee (i.e., human resources committee or other senior managemnt team) may review all TERFs and change status to either **Approved** or **Not Approved**. Status of preliminarily approved TERFs, together with an Executive Narrative and Summary Table, are forwarded to the Mission Director for final approval. The TERFs, Executive Narrative, and Summary Table may now be reviewed online by the Mission Director for final approval. (If the Mission Director requires the Training Plan in hard copy, print out the individual TERFs, Executive Narrative, and Summary Table for submission.)

The Mission Director may review individual TERFs and approve or not approve them by clicking on the icon labelled **Cancelled**. The Mission Director may also indicate

approval of the entire Training Plan (i.e., all TERFs recommended for final approval) by signing the approval box in the Executive Narrative.

Executive Narrative. A transmittal/approval/summary document to accompany **Approved** TERFs is provided and may be accessed by returning to the TEOL repository site. Click on the hyperlink "Executive Narrative"; a text box appears. Position your cursor in the box and type a transmittal or summary cover document to be submitted to the Mission Director for final approval of the Training Plan. A hard-copy version may also be printed out for the files. (Refer to Section H for additional details.)

Recommendation/Approval Box (signature line for Mission Director). An approval box should be included as part of the Executive Narrative; it is suggested that a hard copy of the Executive Narrative be printed for the the signature of the Mission Director to indicate approval of all recommended TERFs (funding of) contained in the Mission's Training Plan.

TERF Status Levels

- **Under Development.** Newly developed or under development

- **Proposed.** TERF ready for management review and funding consideration

- **Approved/Not Approved.** Designated Mission staff will review all proposed TERFs and select those recommended for funding approval; the Mission's designated Training Officer makes the status change

  Once an event is **Approved**, it may be
  - **Completed** (Section I will now appear on the TERF)**,**
  - **Canceled,** or
  - **Returned for Revision**

    If an Approved event is **Returned for Revision**, it is marked in the training event display as **Under Development—Previously Approved**. The Training Officer also makes the status change (no other user has the access capability to change the status of a TERF with **Proposed** status).

There are two types of **Returned for Revision** events: those yet to be approved (**Under Development**) and those already approved but in need of further revision (**Under Development-Previously Approved**).

Appendix E provides additional details and guidance on preparing a Training Plan for approval.

Reading Approved Training Plans. To read and review any **Approved** Training Plan—that is, to read approved TERFs for a specific country(ies)—return to the TEOL repository site. Select the appropriate country for a list of approved TERFs. If you have bookmarked the repository page, you will be able to return to it directly. Approved Training Plans are available to those with access level 2 and higher. **Completed** Training Events are available for public viewing (with financial information—Section G—hidden) by anyone with Internet access.

Technical Instructions and Browser Preferences. As previously stated, Training Events On-Line is a database that uses technology to enhance the training planning process. The following details relate to computer and Internet use:

- Computer requirements. To use the Web-based TEOL, the following computer applications are recommended: a Netscape 3.0 (or higher) or Internet Explorer 3.0 (or higher) browser and a minimum of a 28.8 modem connection to the Internet.

> Company firewalls may interfere with the database. Please check with your systems administrator if your network has a firewall.

- Browser tips. Most Web browsers can be adjusted to make the TEOL easier to read. Options are available to change font, color, size, language, and more. If you are using Internet Explorer, select View on the toolbar and then Internet Options. On the Netscape Navigator toolbar, select Edit and then Preferences to make browser options available.

- Documents and Views. The TEOL database consists of documents and views. Documents are the individual pages of information stored in the database. In the TEOL, each Training Event developed with the TERF is a document.

The documents available in the TEOL repository are organized into lists called views. The views available on the TEOL organize documents into the following categories:

- **By Country and Mission SO.** TERFs are categorized alphabetically by country and are sorted hierarchically by Mission Strategic Objective number. This is the default view when the TEOL is first entered.
- **By FY and Quarter.** TERFs are categorized chronologically according to the fiscal year and quarter in which the training is to begin.
- **By E&E SO.** TERFs are categorized hierarchically according to E&E Strategic Objective number.
- **By Status.** TERFs are categorized according to the status of the Training Event: Under Development, Proposed, Approved, Not Approved, Under Development—Previously Approved, Canceled, and Completed. See section above on status.

The views are also the entry point for opening and reading documents. To open a document in a view, simply double click on the document title.

- **Expand and Collapse.** All views can be displayed in one of two modes: "Expand All" or "Collapse All." In the Expand mode, the view displays all the documents available under each section heading. By clicking on the blue arrows entitled Expand All or Collapse All, you can expand a section to read its contents or collapse it so that it takes up less space on the screen. When first opened, all views default to the Expand mode, revealing all entries in a particular view. Clicking on Collapse hides them again.

- **Navigating the TEOL.** Navigating the TEOL is similar to navigating the World Wide Web. Areas called hotspots or links are embedded in the TEOL. When the mouse rolls over a link, the pointer changes to a hand icon. Clicking on a link executes an action that takes the user to a new section on the TEOL (or the WWW).

  Links can be embedded in text or a graphic. Text links or hypertext appear as underlined text, highlighted in color (usually blue). A graphic link has no obvious identifiers other then the function represented by the graphic.

- **Scrollbars.** Use the scrollbar on the right margin of your browser to move a document up and down when it is too large to be fully displayed on screen. To move to a location in a document, drag the scroll box to the position in the scroll bar that corresponds to the desired location. To move up or down one screen at a time, click the scroll bar above or below the scroll box. To move up or down one line at a time, click the arrows at the top or bottom of the scroll bar.

- **Previous and Next.** The Next and Previous buttons are used to scroll through the TEOL views when the list of documents in a particular view extends beyond the screen. Previous takes you to the previous screen in a particular view; the icon for this function is a left-facing arrow. Next takes you to the next screen in a particular view; the icon for this function is a right-facing arrow.

If there is only one page in a view, these tools are not applicable.

- **Read mode.** When a document is opened, it is automatically launched in Read mode. Users can only read the document; they cannot make permanent changes to it. To make changes to a document, the document must be in Edit mode.

- **Edit mode.** Put the document in Edit mode by clicking on the Edit Document icon. Editing rights depend on access levels. Remember to save all changes by clicking on the Save icon.

- **Other icons.** The TEOL contains other icons that execute specific database actions. The following icon buttons are located on the top and/or bottom of the TERF:

Close Document. Click on the Close button to close and exit the document. Once the document is closed, you return to the default TERF by country and Mission SO view.

Copy Document. The Copy button creates an identical copy of a Training Event. Once a document is copied, changes can be made to the TERF and a new Training Event can be developed that is specific to the copying Mission (remember to click on the Edit icon and the Save icon). The copy then becomes completely independent of the original TERF—especially if you enter a new event title—such that a user does not

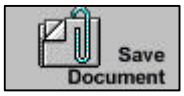
have to re-enter individual bits of information multiple times. To use the copy function, use the following steps:

- Open the Training Event to be copied.
- Put the Training Event in Edit mode and click on the Copy Document button. The current Training Event is then automatically saved and closed.
- A new copy of the Training Event is developed and opened in Edit mode. A reminder that the document is a copy is posted at the top of the TERF.
- Make any changes to the copy before saving. Once the document is saved, the title of the new copy includes the text "(Copy of)" in the title box.
- Before closing the copy, rename the Training Event to exclude the "Copy of" text—go to Section C.2—and make changes as necessary to adapt the training event to your country particulars. Regardless of the status of the original Training Event, the new copy always defaults to **Under Development** status.

Delete. Once a TERF is saved, it can be deleted only by the TEOL systems administrator in the E&E training office. Requests for deleting TERFs may come only from the Mission's designated Training Officer.

Help "Buttons." In addition to the downloadable TEOL User's Guide/Tutorial, detailed information and direction are available directly on the TEOL. Throughout the TERF, help buttons appear to provide context-related information on different sections of the TERF. If you require additional assistance not provided by the help buttons or the User's Guide, please contact the E&E training office (jnindel@usaid.gov).

Print. Click on the Print button to print a copy of your TERF.



Save Document. Click on the Save button to save your work. You are advised to save a document intermittently during your work session, such as after each section/subsection. Select **Save** before closing the document in preparation for exiting and before using the "back" button on your Web browser. To prevent loss of data, you must save your work before leaving the document.

Search. Click on the Search button to find all documents that contain particular words or phrases. Clicking on the Full Text Search button accesses a page with a box for entering the words or phrases to be searched for in the TEOL. Searches are not case-sensitive. To search for more than one word at a time, use the Boolean operators such as "and" or "or." For example, Albania *and* Armenia retrieves documents that contain both words. You can use the ampersand symbol (and) in place of the word. Albania *or* Armenia retrieves documents that contain either word.

- **Browser preferences for TEOL.** For TEOL to display your work properly, it is important that you have a compatible Web browser and that the browser is properly configured.

  You will need Version 3.0 or higher of either Netscape Navigator or Microsoft Internet Explorer. In addition, you will need to configure the browser to ensure access to the latest copy of a Web page. The browser may default to a previously viewed version of a page. In other words, though your work has been entered into the TEOL, it may not display until you begin a new browser session.

  Listed below are the easy-to-follow instructions to help you configure your browser. (You may want to check with the Mission's computer specialist.)

  On the Internet Explorer 3.0 toolbar, click on the View tab and select Internet Options in the pull-down window. Once in Internet Options, click on the Advanced tab and click the Settings button under "Temporary Internet Files." In the Settings window under "Check for newer versions of stored pages," select "Every visit to the page." Once you have selected the "Every visit to the page" option, click the "OK" buttons until all the toolbars are closed. You are now ready to use the TEOL.

  On the Internet Explorer 4.0 toolbar, click on the View tab and select Internet Options from the pull-down window. Once in the Internet Options window, click on the General tab and select the Settings button under the "Temporary Internet Files" section. Now in the Settings windows following the text "Check for newer versions of stored pages," select "Every visit to the page."

You have completed the process. Now simply click the "OK" buttons until all the toolbars are closed. You are ready to use the TEOL.

In the Navigator 4.x toolbar, click on the Edit tab and select Preferences. In the Preferences window, expand the Advanced category by clicking the plus sign to its left and click on Cache. Click "Every time" under "Document in cache should be compared to document on network." Click the "OK" button and you're ready to return to the TEOL.

- How do I...?

Develop a Training Event. To add a new Training Event to the database, click on the text "Develop a New Training Event" to open a blank Training Event Request Form. For specific information on completing the TERF, review the procedures outlined earlier in this User's Guide/Tutorial. Also refer to the TRC Workbook.

Enter text into boxes. Using the mouse, position the cursor inside the text box and begin writing. When the text is completed, hit return and the text will be entered.

Open a document. Double click the document title that is underlined and highlighted (indicating that the text is "linked" to a document). See Document and Views above.

If the Training Event developed as part of this guide is not to be submitted for funding consideration (i.e., status changed to **Propose**), please remember to delete it from the TEOL database by completing the following steps:

1. Enter the TEOL database in accordance with the instructions provided earlier in the User's Guide.
2. Locate your country and the Training Event you developed (you may want to practice by clicking on "Training Event Request Forms by Status" to view TERFs **Under Development**).
3. Highlight your practice Training Event by clicking on it.
4. Hit the delete button.

For help at any time or if you have questions and concerns not addressed in this User's Guide, please email jnindel@usaid.gov or send a message to the E&E webmaster.

Now, you are ready to develop an actual Training Event by using the TEOL/TERF (and the TRC Workbook). We welcome your feedback on the User's Guide and Tutorial, the Workbook, the TEOL systen, and the tools provided on the website.

In addition to information and resources furnished below, the E&E Training Assistance Web page provides other resources such as ADS 253, the Success Story database (of Training Events), the TRC workbook, etc.

APPENDIX A—Measurable Terms

The following is a list of suggested verbs to be used when creating Training Event objectives. (Refer to Exercises 10 and 11 in the TRC Workbook.)

Reminder. "Understand" and "know" are examples of words that cannot be measured, appraised, or quantified.

Words on the following list are provided for your use as you draft Training Event objectives. They suggest actions (measurable and achievable) that will address performance gaps in support of the achievement of IRs (targets and indicators) and SOs.

Act	to perform a specified function
Adapt	to suit or fit by modification
Administer	to manage or direct the execution of affairs
Advise	to recommend a course of action; to offer an informed opinion based on specialized knowledge
Allot	to assign as a share
Analyze	to separate into elements and examine critically
Apply	to put to use for a purpose; to employ diligently or with close attention
Approve	to accept as satisfactory; to exercise final authority with regard to commitment of resources
Assess	to determine value of; to evaluate
Assist	to help or aid others in the performance of work
Carry out	to put into execution; to bring to a successful issue; to continue to an end or stopping point
Certify	to confirm as accurate or true (and to be held accountable for that confirmation)
Clear	to gain approval of others; to free from obstruction; to authorize; to get rid of
Define	to clarify; to provide a definition of
Document	to provide with factual or substantial support for statements made or a hypothesis proposed; to equip with exact references to authoritative supporting information
Draft	to prepare papers or documents in preliminary form

Employ	to make use of; to use or engage the services of; to provide with a job that pays wages or a salary
Ensure	to make sure, certain, or safe; to guarantee
Establish	to bring into existence
Estimate	to forecast future requirements
Examine	to inspect closely
Exercise	to exert influence; to train by drills and maneuvers; to use repeatedly in order to strengthen and develop
Expedite	to accelerate the process or progress of
Facilitate	to make easier
File	to arrange in a methodical manner
Finalize	to put in finished form
Follow up	to pursue closely to check progress
Formulate	to develop or devise
Furnish	to provide what is needed; to supply
Gather	to collect; to harvest; to accumulate and place in order
Handle	to manage with the hands; to deal with, act on, or dispose of
Help	to be of use to; to relieve; to remedy; to serve
Identify	to establish the identity of; to associate with some interest
Organize	to arrange; to systematize or methodize
Oversee	to watch; to superintend; to supervise
Participate	to take part in
Perform	to fulfill or carry out some action
Plan	to devise or project the realization or achievement of a course of action
Prepare	to make ready for a particular purpose
Present	to introduce, to bestow, to lay as a charge before the court; to offer
Process	to subject to some special treatment; to handle in accordance with a prescribed procedure
Procure	to obtain possession of; to bring about
Produce	to grow; to make, bear, or yield something; to offer to view or notice; to exhibit
Project	to throw forward; to present for consideration; to communicate vividly, especially to an audience
Purchase	to buy or procure by committing organizational funds
Rate	to assess the value of; to appraise; to arrange in sequence of rank

Recommend	to advise or counsel a course of action; to offer or suggest for adoption
Record	to register; to set down in writing
Report	to present an account of, either written or oral
Request	to ask for (formally)
Research	to inquire specifically by using involved and critical investigations
Revise	to rework in order to correct or improve; to make a new, improved, or up-to-date version
Schedule	to establish a time frame for action
Solve	to find a solution for
Strengthen	to make or become stronger
Supervise	to direct and inspect the work or actions of others; to oversee
Survey	to look over and examine in detail; to study or view comprehensively; to determine position, boundary, area, elevation, etc.
Tailor	to make or fashion for a specific purpose
Test	to examine or evaluate something; to determine one's skill, knowledge, intelligence
Train	to instruct or condition to some manner of behavior or performance
Update	to modernize; to bring up to date
Use	to put into action or service; employ for some purpose
Validate	to substantiate; to declare or make legally valid
Verify	to prove the truth of by presenting evidence or testimony
Write	to create or put down on paper; to communicate by writing

The following is a sample of general (i.e., vague) verbs and more descriptive terms for various job actions associated with them

Compare	affirm, catalogue, check, classify, edit, index, proofread, rate, revise, verify
Contact	attend, call, collaborate, conduct, confer, consult, cooperate, correspond, discuss, facilitate, inform, interview, notify, participate, refer, request, requisition, visit

Control	act, act for, administer, adopt, anticipate, approve, arrange, assign, authorize, cancel, close, conduct, contract, coordinate, correct, decide, delegate, determine, direct, employ, ensure, execute, expedite, follow up, implement, initiate, keep, maintain, manage, obtain, order, oversee, release, represent, route, schedule, secure, select, sign, supervise,
Study	analyze, ascertain, audit, estimate, examine, inspect, investigate, observe, review, sample, scan, screen, search, survey, test
Teach	guide, instruct, train
Additional Verbs	classify, communicate, correlate, describe, develop, distinguish, identify, integrate, name, recognize, recount, reduce, relate, report, utilize

The above is illustrative only.

APPENDIX B—Sample Stakeholders' Agreement

PART A—Training Outline

1. World Learning—Training for Europe agrees to provide, through the Training Provider, _____, short-term training in the area of_____ designed to address USAID/_____'s Strategic Objective #_____: (description) _____Intermediate Result #_____: (description) _____.

2. The training will include practical, technical training in the content areas of
a)_____,
b) _____, and
c) _____.

3. Specific skills to be developed include a) _____,
b) _____, and c) _____.

4. The ultimate goal of the training is to enable the trainees to _____ _____ to use back in their organization (see attached action plan).

PART B—Trainee Agreements

The following trainees agree to participate to the best of their ability in the above training, resume their positions upon completion of the training, and work in their organizations to achieve the following outcomes:

- present to other members of their organizations a general overview of effective techniques and lessons learned during the training; and
- with the help of a technical adviser, adapt lessons learned as a result of the training to the reality of their own organization/country and develop and implement an action plan to _____.

Trainee Name _____ Title _____ Date _____

Trainee Name _____ Title _____ Date _____

Trainee Name _____ Title _____ Date _____

PART C—Supervisory/Managerial Agreements

The supervisors of the above trainees agree to allow their employees to participate in the above training and, upon their return, to resume their positions for a minimum period adequate to implement the action plans agreed upon as a result of the training. They, moreover, pledge to support the implementation of agreed-upon action plans in whatever way possible.

Name _____ Title _____ Date _____

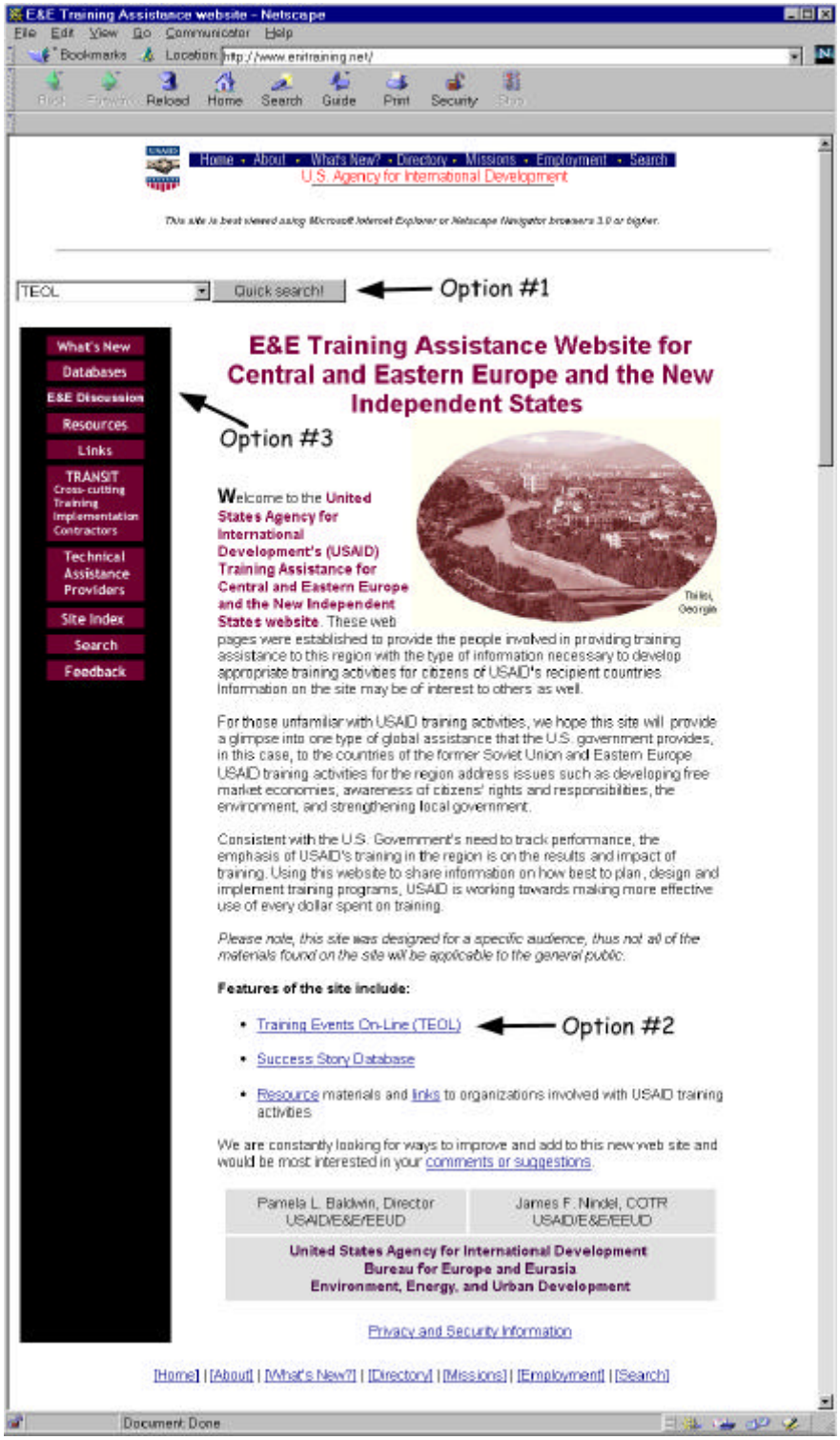
Name _____ Title _____ Date _____

PART D—Approval

USAID/_____ approves of the training mentioned above and will support follow-up toward achievement of the Intermediate Results addressed.

Name _____ Title _____ Date _____

Appendix C—Sample Screens from the E&E Training Assistance Website and the Training Event Request Form



TEOL - Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://eni.interliant.com/eni/teol.nsf/?Open

Back Forward Reload Home Search Guide Print Security Stop

Bookmark this page today !

ENTER TEOL

Enter here to access completed training events only. Passwords not required.

Registered Users ENTER HERE

Enter here to access all training events. Passwords required.

Return to the E&E Training Assistance website

Click here to give us your Comments, Questions, and Feedback about the system.

USAID

Training Events On-Line (TEOL)

USAID

TEOL helps the USAID training community by:

1. Providing a way for training professionals to share "best practices" for results oriented training events.

2. Providing a standard tool, a **Training Event Request Form (TERF)**, for developing Training Events.

3. Providing guidance on preparing mission Training Plans.

4. Making available support and direction on USAID's Training for Results Chain.

5. Allowing **geographically dispersed** Strategic Objective team members to work together in the **planning** of Training Events.

6. Serving as an **online repository** for approved Training Plans and completed Training Event Request Forms. When planning a Training Event, for example, search TEOL for other events with similar characteristics, or find training providers who have offered the training you are seeking. The online repository also allows individual missions to view TERFs at various development stages; and allows the USAID community to better monitor, manage, and evaluate training programs.

7. Provides a system for reviewing, prioritizing and approving USAID-funded training.

8. Providing a way to **share Training Event information** between the planners and the implementers of Training Events.

9. Permitting a worldwide audience to view completed E&E Training Events.

CLICK HERE to download the TEOL User's Guide/Tutorial.

Document: Done

TE/Country - Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://eni.interliant.com/ENI/teol.nsf/TE%2FCountry?OpenView

Bookmark QuickFile

Back Forward Reload Home Search Guide Print Security Stop

USAID

PREVIOUS NEXT Full Text Search

Mission Training Plans (by Country & Mission SO)

Welcome to TEOL: Manager6. December 30, 1999

Mission Training Plans

Mission Training Plan View

Training Events

By FY & Quarter

By E&E SO

By Status

By Country & Mission SO

Develop New Training Event

E&E Training Assistance WebSite

Click here to give us your Comments, Questions, and Feedback about the system.

Expand All Collapse All

Mission SO/IR	Event Title	FY/Qtr	Status	Trainees	Wks.	Priority
Albania						
	EXECUTIVE NARRATIVE SUMMARY TABLE					
1.3/1.3.2	Small Business Licensing	99/1st	Completed	10		A1
1.1/	NGO Development II	99/1st	Completed	0		A1
Russia						
Ukraine						

Expand All Collapse All

PREVIOUS NEXT Full Text Search

Document: Done

Training Event TITLE: - Netscape

File Edit View Go Communicator Help

Bookmarks Location: http://eni.interlink.com/ENI/tecl.nsf/5c209a5ae6f7cb27852566c7006470af?OpenForm

Back Forward Reload Home Search Guide Print Security Stop

USAID

Save Document | Close Document | Copy Document

Please save your Work

Propose

This event is: Under Development

User Name: Jeffrey Magnuson

Last Updated: 12/26/99

TRAINING EVENT:

Enter Event Title ==>

Section A: General Information

Save Document

Please save your Work

A.1 USAID Country and SOs

Country: -select- / Albania

Help!

E&E SO:

1.1 Increased transfer of state-owned assets to private sector.

Select AID/W provided SO(s) closest to language to objective(s) supported by this Training Event

MISSION SO:

--- 1.1 Increased transfer of state-owned assets to private sector.

--- SUPPLEMENTAL MISSION SO:

1.1 Increased transfer of state-owned assets to private sector.

A.2 USAID Technical Officer:

Help!

USAID Officer:

Position:

Office:

Telephone Number:

Fax Number:

E-mail Address:

A.3 Technical Assistance (TA) Contractor/Grantee

Help!

Contractor/Grantee:

Contact Name:

Telephone Number:

Fax Number:

E-mail Address:

Additional TA Contractors

A.4 Contact for Training Event Details

Help!

Name:

Organization:

Address:

Telephone Number:

Fax Number:

E-mail Address:

Section B: Intended Results

Save Document

Please save your Work

Requests for information in this section may seem duplicative. This is intentional as part of the thought process to create a Training Event for results and impact.

B.1 Provide brief background on SO(s) selected.

1.1 Increased transfer of state-owned assets to private sector.

1.2 Increased soundness of fiscal policies and fiscal management practices. Help!

B.2 Intermediate Results (IR)

Enter relevant IR (s); number and text as given in Mission's most recent R4 document.
Enter all IRs supported by this Training Event; use the language in Mission's approved R4 document.

IR Number: Help!

B.3 Performance Indicators, Baselines, Targets

Enter the Performance Indicators, Baselines, and Targets identified by SO team. Help!

B.4 Performance Results

Help!

a. What organization(s) does this Training Event support? What work units in the organization does this Training Event Support? Help!

b. What are the performance problems that this training will address? In the work unit, what are the indicators of performance? Help!

c. What is the history of assistance to this organization? To the work unit? Help!

d. What other support activities are required to achieve desired results? Help!

B.5 Application of Knowledge, Skills, Attitude (KSA) by Trainees

Help!

a. How will the Trainees apply the Knowledge, Skills, and Attitude? Help!

b. What will the trainees be responsible for? Help!

c. What is necessary for the Trainees to apply KSA learned? Help!

B.6 Objectives of Training Event

What Knowledge, Skill(s), and Attitude(s) should Trainees acquire from the Training Event? Objectives should be written in specific and concise "measurable terms" (e.g., define international banking terms; set up programs to provide letters of credit).

At conclusion of Training Event, Trainee(s) will be able to: Help!

B.7 Training Event Components and Follow-on Help!

a. Training Event Component Help!

b. Projected Follow-on Activities Help!

B.8 Funding Priority of Training Event: A.1 Help!

Additional priorities

Section C: Training Event

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C.1 Training Management

Issues or concerns that must be taken into consideration in either the design or the delivery of this training activity. Help!

C.2 Event Title Help!

C.3 Training Venue: Help!

☐ In Country ☐ US ☐ Third Country

Third Country:

C.4 Type of Course: Help!

○ New Event

○ Repeat Event

○ Modification of an Event previously funded

Sector:

Course Title:

Training Event Code:

C.5 Training is to begin the 1st **Quarter of FY** 1999 . Help!

Training duration in weeks:

C.6 Number of Trainees to attend Event Help!

Males:

Females: **0.0%** *USAID goal is 50% female participation.*

Total:

C.7 Suggested Training Provider to Receive RFTPs (if any) Help!

(please provide contact information)

*** * *If this is an academic event, skip ahead to Section F.* * ***

Section D: Background/Supporting Information

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Provide other information which will be helpful in designing the Training Event (e.g., history of country; history of program this event supports; background of organization or host country organization).

Help!

Section E: Trainee Profile

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E.1 Criteria for Candidate Recruitment and Selection

Persons who are members of the Parliament or are high-level government officials, as well as persons who have previously participated in USAID training in the last two years, must be approved by the Mission Director prior to recruitment.

Candidate(s) will be identified:

Help!

- ☐ By current/future employment position
- ☐ By participation in seminar or other in country training activities
- ☐ By contribution to organizational performance improvement
- ☐ Other

Explanation:

Summary of Desired Candidate Qualifications

Include, if applicable, preferred educational background, experience and/or areas of expertise, professional position, organizational affiliations.

Help!

E.2 English Language Testing: ○ Required ○ Waived

Help!

Interpreter requested? ☐ **Yes** ☐ **No**

Language(s) required

*** * *If this is not an academic event, skip to Section G.* * ***

Section F: Academic Training

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F.1 Type of Academic Training: Help!

- Associate's Degree
- Bachelor's Degree
- Master's Degree
- Ph.D. Program
- Other

F.2 Course of Study: Help!

F.3 Minimal Qualifications: Help!

F.4 Suggested Academic Institution: Help!

F.5 Other:

Section G: Cost Estimates

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G.1 Estimated Total U.S. $ Cost per Trainee

Help!

Type	Amount
Instructional Cost:	$
Trainee Cost:	$
Travel Cost:	$
Total Est. Cost:	$ 0

G.2 Funding Source

Estimated amounts of funding by source for this event

Help!

USAID	Amount	Description
GTD:	$	
Contract:	$	
Other:	$	
Other:	$	
Other:	$	
Total USAID	$ 0	

Other Resources	Amount	Description (US$ cost-share and/or in-kind)
Employer:	$	
Host Gov't:	$	
Private:	$	
Training Provider:	$	
Other:	$	
Other:	$	
Other:	$	

Section H: Approvals

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Please save your Work

Help!

Approved by:	Position:	Date:

Comments

Section I: Post Training Event

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Please save your Work

I.1 Event Title: Help!

Please include any relevant code numbers (e.g., PTP #) if applicable.

I.2 Training Provider(s):

I.3 If HBCU/HSI Provided U.S. Training, ☐ check here

I.4 Actual Dates of Event:

I.5 Actual Number of Trainees

Males	Females	Total

I.6 Please provide a brief listing/description of training outcomes.

(e.g., 5 Trainees received certificate of competency in international accounting standards; draft media public service announcement on AIDS produced; etc.)

I.7 Evaluation Schedule

When is the best time to conduct returnee evaluation on this event?

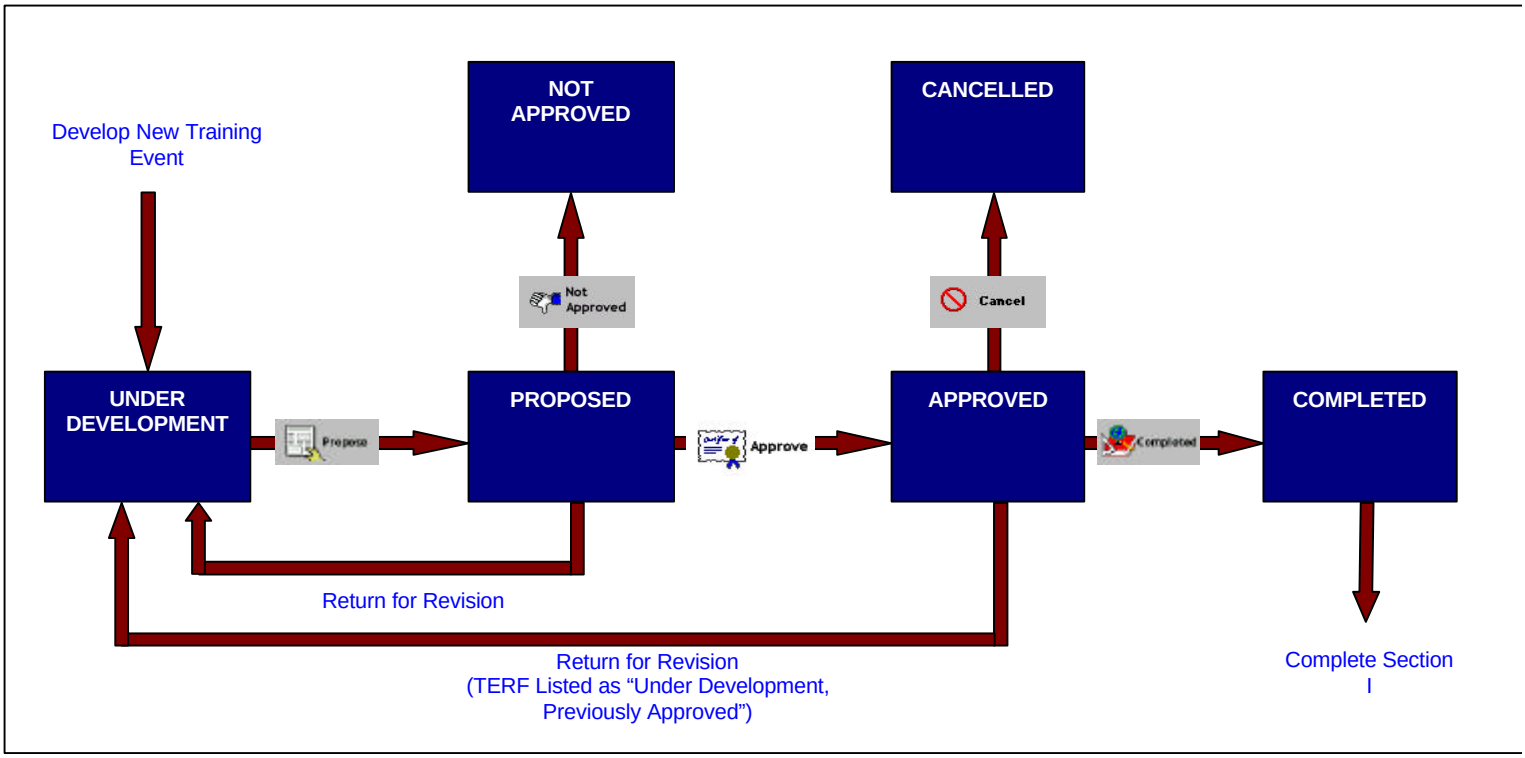
- ○ 6 Months after event
- ○ 9 Months after event
- ○ 1 Year after event
- ○ Other

Other:

I.8 Other

APPENDIX D: TEOL Flow Diagram and Access Levels Table

Flow Diagram of TEOL Development, Review and Approval Process



TEOL Access Levels and Functions

	Single TERF	Mission TERFs	Regional TERFs
Level 1 (Reader)	• **Read Completed**		
Level 2 (Author)	• Write and edit own **Under Development** • Change own to **Proposed**	• Read **Approved**	• Read **Approved**
Level 3 (Editor)	• Write and edit own **Under Development** • Change own to **Proposed**	• Edit **Under Development** • Change **Under Development** to **Proposed** • Change **Proposed** to **Return for Revision** • Read **Approved** • Read **Executive Narrative** • View **Summary Table**	• Read **Approved**
Level 4 (Manager)	• Write and edit own **Under Development** • Change own to **Proposed** • Change to **Approved** • Change own to **Completed**	• Edit **Under Development** • Change **Under Development** to **Proposed** • Change **Proposed** to **Approved, Return for Revision**, or **Not Approved** • Change **Approved** to **Return for Revision, Completed,** or **Cancelled** • View financial data (Section G) • Enter post-training data (Section I) • Write and Edit **Executive Narrative** • Assign user access levels • View **Summary Table**	• Read **Approved**

APPENDIX E—Preparing a Training Plan for Approval

Introduction/Background. This addendum to the TEOL User's Guide provides step-by-step guidance on preparing a training plan for approval. The information is in addition to that contained in the body of the TEOL User's Guide. Users with access levels of 3 or higher, i.e., those designated as the USAID staff responsible for drafting Mission Training Plans, are the appropriate audience for this addendum.

It is **strongly recommended** that the addendum be used only **after** the main body of the TEOL User's Guide has been read. It is further recommended that the exercises in the TRC Workbook be completed before using this addendum.

Neither the addendum nor the User's Guide is intended to supersede or take the place of other reporting systems.

DEVELOPING A TRAINING PLAN AND PREPARING IT FOR APPROVAL

The following steps are recommended in preparing a Mission's Training Plan:

1. **In SO/RP team meetings (core and expanded), USAID staff identifies performance needs and determines what types of training interventions are needed to address those needs.** Input from other TA contractors/grantees, institutional partners, host-country counterparts (public and private), returned trainees, and others is encouraged.

The collected information forms the basis for one or more Training Events that directly support achievement of specific IRs (and sub-IRs) that, in turn, support an identified SO (refer to the TRC Workbook for additional guidance as well as exercises to assist SO teams in identifying performance needs). This information, especially for GTD)funded training activities, is captured on one or more TERFs.

2. **From the above discussions, individual Training Events are developed by using the TERF.** While the TERF is usually used for GTD-funded training activities, it may also be used for other USAID-funded training activities such as those that are part of a TA contract/grant. A Mission Training Plan ***ideally*** includes ALL USAID-funded training activities. Therefore, TA contractors/

grantees should be encouraged to use the TEOL/TERF system to prepare Training Events for approval.

The TEOL/TERF system supports USAID officers in the development, processing, monitoring, and evaluation of all USAID-funded training events, activities, and trainees.

Note. A Mission may request a common (single) user name and password for an entire SO team to allow members to develop training events concurrently. Individual members, such as SO team leaders, may also be issued individual user names and passwords.

TERFs **Under Development** may be shared with others by copying the TERF and pasting it to an email message (copying/pasting does not include TERF formatting). Recipients should be reminded to review the language (i.e., substance) only. TERFs may be emailed to any one the author wishes to share the information with, including virtual team members in Washington, D.C.

3. **Once a Training Event is fully developed by those involved in Steps 1 and 2[16], the author of the TERF changes its status to "Proposed."** At this point, as required, an SO team leader or office director or other more senior USAID officer may review and/or edit TERFs with the status **Proposed** and indicate approval or return the TERF for more information/work. These users would be assigned access level 3 (editor status).[17]

There are several ways for supervisors to indicate approval of a TERF with the status **Proposed**. After an author (user with access level 2) has notified supervisor(s) that a TERF is ready for review and approval,

a. Supervisory USAID officers may initial over their name(s) (included in Section H), on a hard copy printout of individual Training Events; or

[16] Persons involved in the development of a Training Event may view and/or edit the document electronically by using the TEOL, provided that they have been assigned appropriate passwords.
[17] Developers of Training Events advise supervisors/managers that an event is ready for review on the TEOL.

b. Approving USAID officers fill in the date of approval next to their name and position (Section H). Filling in the date is another method for indicating online approval.

In either case, authors may wish to have a printed and signed document for each TERF submitted for approval.

The last supervisor advises the USAID officer responsible for the Mission's Training Plan (herein called the "Training Officer") that a TERF has been reviewed and is now ready for final approval by the senior management of the Mission. The review/edit process may be repeated as often as the Mission organization requires.

4. **The Mission's Training Officer or *ad hoc* Training Selection Committee* may view any and all TERFs with the status of Proposed.** (Access the TEOL database, selecting "Training Events-by Status" on the menu listed on the left of the TEOL repository and review TERFs with the status of **Proposed**.)

*Note. The Mission may designate an individual (e.g., Training Officer) or group of individuals to review and edit as necessary all TERFs with the status **Proposed** and to select TERFs to be recommended for final approval by the Mission Director (or designee). A representative from the Mission's Program Office or Budget Office is suggested for inclusion on the committee. Individuals must have editor or manager status (access level 3 or 4).

At this step, the Training Officer/committee should review the priority levels of each TERF within individual SOs and make appropriate changes (i.e., reprioritize) as needed. (Double click on each individual TERF, click on the Edit icon, review information, and edit as needed, including priority status in Section B.8.)

Note. Each SO will have a separate priority list of TERFs and activities that support achievement of the SO.

5. **Changing TERF status from Proposed to Approved or Not Approved.** The Training Officer accesses the TEOL system to make appropriate changes to TERFs submitted for final approval. At the TEOL repository site, double click on each individual TERF, click on the Edit icon, and make one of the following status changes as determined in Step 4:

a. **Approved** (TERF will be submitted in the recommended Mission Training Plan);

b. **Not Approved** (The committee has decided not to approve); or

c. **Return for Revision** (click on the blue hyperlink; the TERF is returned to its **Under Development** status. The author(s) should be advised by email that the TERF requires additional information or changes.

6. **The Training Officer drafts an Executive Narrative to accompany preliminarily Approved TERFs** and provides other information required by the Mission. The Executive Narrative should also include other USAID-funded training activities/events (i.e., project-funded training).

The TEOL system also produces a Mission Summary Table that lists all **Approved** TERFs reprioritized by SOs. The Executive Narrative, Summary Table, and approved TERFs constitute the Mission's Training Plan.

Note. Although selected TERFs have had their status changed to **Approved,** they are not officially approved for funding until the Training Plan has received approval from the highest Mission authority for approving the plan, i.e., the Mission Director or Deputy Mission Director.

Executive Narrative. After the Training Officer/committee has reviewed and reprioritized TERFs for GTD funding, an Executive Narrative should be drafted. The Executive Narrative may contain the following information:

- narrative summary of the Training Events recommended for funding approval (e.g., funding per SO; trainees per SO; etc.) *;
- brief background on earlier Mission training activities and outcomes;
- rationale for selection of TERFs to be approved *;
- process of Training Event development and selection;
- total GTD-funded training events *;
- other USAID-funded training activities listed and described *;
- other USG-funded training activities that complement USAID efforts *;
- special issues of concern to USAID: gender selection, special host-country initiatives, U.S. congressional earmarks, AID/W directives, etc. *;

- future plans, e.g., monitoring programs, evaluation activities, including follow-on *;
- recommendations *;
- review of approval process *;
- signature block for Mission Director *; and
- other information as required.

*Strongly recommended for inclusion.

Drafting an Executive Narrative. Return to the TEOL repository site. Click on the blue hyperlink entitled "Executive Narrative" located in the middle of the screen. A text box will appear. Position your cursor in the box and type a transmittal or summary cover document that includes items suggested above. Again, an approval signature box should be included and a hard copy of the Narrative should be printed for the signature of the Mission Director.

Only one Narrative per Mission per year may be created by those with access level 4. Such users may access the Executive Narrative for editing as many times as needed. (After the Mission's Training Plan has received final approval, all users with access level 2 and higher may read the Executive Narrative.)

Summary Table. The TEOL system provides a "spreadsheet" of all **Approved** TERFs. In most cases, the table captures only GTD-funded activities. Other USAID-funded training activities may be presented in the Executive Narrative; see above.

At present, the Summary Table contains the following fields:

- Strategic Objective/Intermediate Result by number;
- Training Event title;
- whether event is an ICT/TCT/UST event;
- FY/Quarter when training is to take place;
- number of trainees planned and actual and by gender;
- estimated total cost of Training Event (with USAID funding and other funding listed);
- HBCU/HSI status; and
- TA contractor associated with TERF.

7. **Final Approval.** A complete Training Plan consists of the following:

- Executive Narrative;
- TERFs (preliminarily approved but with **Approved** status); and
- Summary Table.

The Training Officer or other senior management officer advises the Mission Director that the recommended Mission Training Plan is now available online at the TEOL site. A hard-copy (printed) version of the recommended Training Plan may also be submitted.[18]

In addition to reading the three sections of the Training Plan, the Mission Director may review individual TERFs recommended for approval by logging onto the E&E website, accessing the TEOL system, clicking on the blue hyperlink entitled "By Status" to the left of the repository site screen, and scrolling to view a list of **Approved** TERFs. For each individual TERF, the Mission Director may then confirm that the TERF has been approved by leaving the status as is. On the other hand, the director may decide not to approve the TERF or request revisions by first clicking on the Edit icon for each individual TERF and then clicking on the icon labeled **Not Approved** or the blue hyperlink entitled **Click Here to Return for Revision**.

For those TERFs that the Mission Director has changed to **Not Approved**, the Mission's Training Officer may choose to reenter the TEOL system, access the repository site, click on the hyperlink "By Status," and scroll to locate TERFs whose status is **Not Approved**. These TERFs may stay in **Not Approved** status, or the Training Officer may change their status to **Canceled**.

For those TERFs that the Mission Director has returned for revision, the Training Officer accesses the repository site as indicated above and then scrolls to the part entitled **Returned for Revision** to monitor that the authors are providing the information requested or addressing the revisions required. All TERFs **Returned for Revision** revert to **Under Development** status.

[18] It is recommended that a hard copy version be printed for the Mission Director at the current time.

Other Changes in Status. Even TERFs that have been **Approved** may have their status changed before implementation. The Training Officer (and others with access level 4) may access individual TERFs and change their status to **Canceled** by clicking on the appropriate icon. If changes are required before the event is implemented—even though approved—the Training Officer accesses the TERF, clicks on the "Edit" icon, then clicks on the blue hyperlink "**Click Here to Return for Revision**." When the status is changed, the TERF's status returns to **Under Development** along with the words "Document was previously approved and then returned for revision on (date)."

Reminder. Although the TEOL is an online system, Mission staff responsible for training may want to print a hard copy of the Executive Narrative for the signature of the Mission Director. If requested by the Mission Director, a hard copy of the entire Training Plan may be printed and forwarded for approval (and signature).

8. **After the Mission Training Plan is approved, a notice may be sent to USAID staff, including the training implementation contractor, indicating that approved TERFs are now online at the E&E training website**.[19] The totality of approved TERFs constitutes the core of the Mission's Training Plan.

TERFs approved for funding indicate that funding is authorized but not necessarily available. Given that prioritization is part of the TERF process, an **Approved** Training Plan establishes a sequence for funding (at whatever dollar level and whenever it is received). The TEOL allows the Mission to change priorities as funding, country, and/or program conditions change. It also allows the Mission to reschedule or **Cancel** an event.

Note. It is strongly recommended that the approval status of TERFs not be announced until the Training Plan has been officially approved for funding by the Mission Director.

[19] Unless otherwise directed, the Mission's training implementation contractor will start processing **Approved** TERFs by preparing RFTPs, recruiting appropriate candidates, etc.

The **Approved** Training Plan is now accessible electronically to authorized users throughout the Mission as well as to the training implementation contractor, who can then begin implementation procedures.[20] The Training Officer sends an email to SO teams (Mission staff) to advise them the Training Plan is approved and may be accessed on the E&E website by going to the TEOL repository site, selecting "Events by Status," and reviewing all **Approved** TERFs**.** Authorized users within E&E/EEUD and other regional and Washington offices are also able to view approved Training Plans.

9. **After a Training Event has occurred, the status of the Training Event Request Form needs to be changed to Completed.** A final section, "Section I. Post Training Information," appears on the TERF. The training implementation contractor can fill out much of this section.

Reminder. While a wide audience may view the Training Plan, only individuals with an appropriate access code may edit the individual Training Events that make up the plan. Budget information contained in Section G is not widely available. A designated person within each Mission—often the Mission's staff person responsible for training activities (i.e., Training Officer)—assigns user names and passwords to authorized TEOL users. All those who access the E&E website may view **Completed** Training Events.

ADDITIONAL NEXT STEPS

Mission staff responsible for training should consider the following next steps:

- Advise the USAID/E&E community (Mission staff, TA contractors, and the training implementation contractor) that the approved Training Plan for the Mission is now available on the E&E website.

- Monitor all **Approved** TERFs and update the TEOL system (may be delegated to training implementation contractor).

- Track funding allocation and appropriation, making changes to Training Plan (and TEOL) as required.

[20] Based on current prioritization and the schedule of approved Training Events contained therein.

- Change status of Training Events as circumstances require (especially events completed); this function may be delegated to training implementation contractor along with the appropriate access level.

- Plan, review/monitor, and schedule all follow-on and evaluation activities.

- Review reports provided by the TEOL system and the training implementation contractor and other sources to prepare for next FY's Mission Training Plan.

Additional support, guidance, and/or information on the TEOL, TRC, and/or the training planning process at any stage is available from E&E/EEUD. Please contact jnindel@usaid.gov.