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What's Your Role?

Training for Organisational Impact



A Guide for Training Officers in Protected Area Management

by **Ralph Stone**

Managing Editor & Designer - **Jared Crawford**

Biodiversity Support Program

The Biodiversity Support Program (BSP) is a consortium of World Wildlife Fund, The Nature Conservancy (TNC), and World Resources Institute (WRI), funded by the U.S. Agency for International Development (USAID) since 1988. BSP promotes efforts to conserve the world's biodiversity by supporting local communities, non-governmental organizations, and governments to establish clear conservation priorities, goals and objectives; socially equitable processes, dialogue and partnerships; ethical valuation of nature; favourable policies; and enhanced awareness and knowledge.

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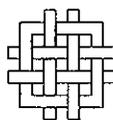
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IN MEMORIUM

Ralph Stone
1958-1997

Prior to his tragic death in July, 1997, at age 38, the author of 'What's Your Role?', Ralph Stone was with the Centre for Development and Population Activities (CEDPA) for 8 years. His contribution to the PARCS project was based upon his experiences with CEDPA providing management training and technical assistance to government agencies and women's NGOs worldwide. Mr. Stone facilitated two of the three regional workshops which feature prominently in the PARCS project. He held a Masters degree in International Development from Columbia University and was completing his Ed.D in Human Resource Development at The George Washington University.

The participants and core team members of the PARCS project who experienced and took pleasure in the warmth, enthusiasm, support and understanding Ralph Stone brought to his work and life are richer for having known him.

ACKNOWLEDGMENTS

Development of 'What's Your Role?' was possible thanks to funding from the United States Agency for International Development (USAID) to the Biodiversity Support Program under the Protected Areas Conservation Strategy (PARCS) project. A number of people have contributed to this handbook, through participation in three cross-regional workshops and testing innovative approaches to training within protected area authorities in ten African countries. The core team of PARCS project managers have dedicated themselves to this work, and special thanks go to those in Nairobi who have taken the book through its final stages of development: Deborah Snelson and Elizabeth Chadri of the African Wildlife Foundation (AWF) and Annette Lanjouw, a consultant with the Wildlife Conservation Society (WCS). Other members of the PARCS team should be acknowledged for their time and technical assistance to the handbook over the life of the project, including Kate Newman and John Magistro of the Biodiversity Support Program (BSP), Dorothy Oyier and Irene Kamau of World Wildlife Fund-US, Hilary Simons Morland and Matthew Hatchwell of WCS, Annie Mpiima and Chris Feral of AWF, and Julian Machange and David Manyanza of the College of African Wildlife Management. D. Manzollilo contributed greatly to the editing of the drafts and final text.

Jared Crawford has made a substantial contribution to the handbook through his interpretation of the content with illustrations and formatting to enable the reader to better understand and assimilate the information presented.

The PARCS project would especially like to acknowledge those who have experimented with the training techniques and approaches presented here: Samba Doukaga and Rufin Oko of the Ministère des Eaux et Forêts, Congo, James Lutalo of the Uganda Wildlife Training Institute, Clement Mbotha of the Department of National Parks and Wildlife, Malawi, and Emmanuel Pouna of the Ministère de l'Environnement et des Forêts, Cameroon, as well as those who have contributed their time and expertise in the field testing and reviewing the handbook.

*What's your Role? is dedicated to the memory of Joe Venter,
founding Principal of the Southern Africa Wildlife College.*

PARCS

The Protected Area Conservation Strategy (PARCS) project was a four-year project to develop a better understanding of how to increase the capacity of natural resource management authorities across Africa to train their staff appropriately. Rather than directly addressing the training needs within protected area authorities, the project attempted to determine, through experimentation with cost-effective and innovative methods, what the best approaches to training would be. The project also facilitated learning through shared discussions across organisations, countries and regions.

The project was implemented by several conservation organisations, in collaboration with protected area authorities across the African continent. The management and coordination of the project was undertaken by the Biodiversity Support Program (BSP), a consortium of World Wildlife Fund (WWF), The Nature Conservancy and World Resources Institute. The African Wildlife Foundation (AWF), Wildlife Conservation Society (WCS) and WWF implemented the project in Africa. The United States Agency for International Development (USAID) and participating organisations provided funding for the project.

During the first phase, the project assessed the training needs of protected area managers in 15 countries across eastern, central and southern Africa. The second phase aimed at testing pilot approaches on how these training needs could best be met in nine countries across the three regions.

The protected area authorities included in Phase II were at different stages of developing training systems, and as a result, no two countries pursued the same approach in addressing training needs. All countries participating in the project shared the goal of developing an institutionalised and sustainable training plan for in-service training within each protected area authority. The operative words were: plan, institutionalised and sustainable. These were the components the project attempted to understand: How to develop a plan for in-service training that enabled the institution to better achieve its mission, that represented the whole institution, and that could potentially become financially sustainable?

To share experiences across the three African regions, the PARCS project organised three cross-regional workshops for project participants from ten African countries.

The countries that were represented at the cross-regional workshops were:

Cameroon
Congo
Kenya
Malawi
Namibia
Rwanda
South Africa
Tanzania
Uganda
Zambia



The first cross-regional workshop took place in Tanzania to discuss approaches to planning training for protected area management. The second workshop was convened in Congo with the theme of institutionalising quality training programmes for improved protected area management. The third workshop, held in Malawi, focused on sustainability of training. During each cross-regional workshop, participants provided updates on PARCS-related activities and discussed lessons learned from pilot projects each country had initiated. The workshops brought together resource specialists of three conservation NGOs, nine protected area authorities participating in Phase II, and trainers from different countries.

The findings in this book, 'What's Your Role?', represent the synthesis of these experiences and the book has been written for PARCS by Ralph Stone, who facilitated two of the cross-regional workshops and visited participating countries to collect information included in the handbook. Throughout the PARCS project, we found that all people have a shared responsibility for training and making knowledge and skills available to others. Although this handbook is designed particularly for use by training officers of protected area authorities, it will be a useful reference for senior managers and human resource development professionals working with any organisation and anyone else who takes responsibility for training seriously.

Introduction to the Handbook

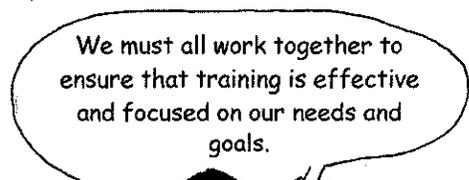
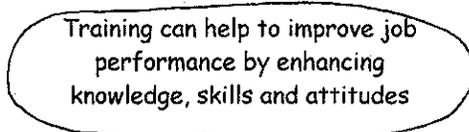
The main purpose of 'What's Your Role?' is to help training officers develop training programmes that enable staff of protected area authorities achieve optimum performance on the job. It is also intended to show how the role of training within an organisation is a primary means to achieving greater organisational impact in protected area management.

'What's Your Role?' is based on three major premises:

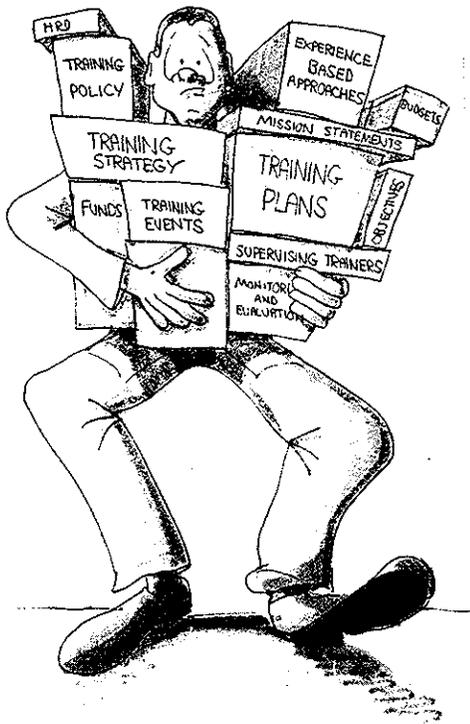
- ❶ Protected area authorities will greatly increase their impact in protected area management if they have a workforce that performs to the best of its abilities.
- ❷ Training plays a crucial role in improving job performance by developing knowledge, skills and attitudes.
- ❸ Effective training in an organisation requires the integration of efforts among managers, training officers and training participants.

The Training Officer's activities respond to the organisation's need for a workforce with up-to-date skills and fit within the broader context of human resource development. Human resource development is the integrated use of training and skills development, career development, and organisation development to improve individual and organisational effectiveness. The scope of 'What's Your Role?' is limited to training because it is the most common strategy used to improve job performance; at the same time, it is perhaps the least understood.

In many protected area authorities, there are a number of low cost opportunities to improve the function of training. These include establishing a training policy, encouraging more participatory planning, applying Experience-based training methodologies, and using monitoring and evaluation for decision making. This book will explore these and other related issues and approaches by focusing on the role of the Training Officer. He or she is the person who must take the initiative to introduce innovative ideas and facilitate change at all levels of the organisation. For the purposes of 'What's Your Role?', we have developed a job description that emphasises the responsibilities of the Training Officer most important to achieving improved performance of the workforce. Each duty listed in this job description is correlated to a chapter of the book.



This book is for you. It should help you to address the many tasks which make up your job description.



Training officers have a lot on their hands. They are the primary agents of human resource development within their organisations. The Training Officer's many responsibilities can be addressed efficiently through good planning and use of effective training methods.

TRAINING OFFICER'S JOB DESCRIPTION

The Training Officer should have experience in designing and implementing participatory, Experience-based training grounded in the Principles of Adult Learning. His or her approach to training should reflect an understanding of how to respond to identified training needs through a variety of planned learning activities. The Training Officer is expected to oversee the planning and implementation of organisation-wide training and to document the impact of training through monitoring and evaluation activities.

Training officer duties include the following:

- Facilitate development of the organisation's training strategy
- Formulate and update the organisation's training plan, including identifying and prioritizing training needs
- Design effective components of the training plan to encourage practical approaches based on experience
- Solicit funding for training from donor agencies
- Organise training events, including identifying and contracting trainers, selecting training participants, and identifying goals and objectives for specific training events
- Assist trainers in designing training activities that lead to targeted behaviour change in participants
- Ensure that internal and external trainers use a variety of participatory, Experience-based training techniques for improving knowledge, skills and attitudes
- Oversee monitoring and evaluation of training activities to provide information for decision making
- Develop annual work plans and budgets for the training unit based on the unit's strategic objectives

Depending on the size and structure of your organisation you may be the only Training Officer or you may be a member of the training unit. In either case, this book is for you.

Using the PARCS Handbook

This guide is designed to assist training officers in strengthening the role of training within their organisations and supporting Human Resource Development (HRD). The guide is divided into four sections based on the Training Officer's role and responsibilities:

Training Officer's Responsibilities

Have knowledge and skills in participatory, behaviour based training.

Oversee the organisation and implementation of institution-wide training. Develop and maintain a training plan which includes prioritized training needs

Design effective components of the training plan.

Obtain financial support for training.

Organise effective training events. Identify and contract trainers, select training participants, and establish goals and objectives.

Assist trainers in designing training activities geared towards attainment of behavioural objectives.

Ensure that a variety of effective training techniques for improving knowledge, skills and attitudes are used by trainers.

Oversee monitoring and evaluation of training activities to provide information for decision making.

Facilitate the development of a training strategy for the organisation. Develop annual work plans and budgets for the training unit based on the unit's strategic objectives

Sections and Chapters	
Section 1	Training Concepts and Overall Planning
Chapter One	Training for Improved Performance
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Chapter Eight	Looking Back
Chapter Nine	Moving Forward

The task of improving the performance of your organisation can not be addressed by the Training Officer alone. Encourage your colleagues to read this handbook and stress which chapters may be relevant to their work.



'What's Your Role?' is not designed to provide step-by-step instructions for training officers. It is, however, intended to provide ideas and guidance on how to make your approach to training more effective. Keep the book handy to consult on a day-by-day basis.

I'm going to keep you with me every day! You have a lot of good ideas!



OBJECTIVES

The Behavioural Objectives for each chapter are indicated by this symbol.

Who Should Use This Book?

In addition to the Training Officer, a number of other stakeholders within your organisation should benefit from using 'What's Your Role?'.

Trainers: Chapters 6 and 7 provide concepts and strategies to make learning a participatory process which incorporates participants' experiences as a foundation for learning. These chapters include step-by-step techniques the trainer can use during a training event.



Pages which may be especially useful for trainers are marked with the symbol of a clipboard. Consider copying these pages and sharing them with your in-house or consultant trainers.

Managers: To support organisational change through improved training, senior level managers need to be aware of all aspects of the training process and the role of the Training Officer. Chapter 1 will be particularly useful in understanding the purpose of training and establishing the organisation's training policy. Chapter 2 will familiarise senior managers with the process of identifying training needs to develop a training plan for the organisation. Perhaps the most useful will be Chapter 9, which discusses the training unit's advancement within the context of the entire organisation. It encourages the Training Officer to identify and discuss issues with senior managers in order to support the organisation's objectives for a highly skilled workforce.

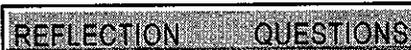
Supervisors: The supervisor plays an important role during the time prior to, and after, a training event through collaboration with the Training Officer in participant selection and preparation, and in providing follow-up support and evaluation input. Chapter 2 will help the supervisor understand how training needs are identified based on an employee's performance in relation to his or her job description. Chapter 3 discusses how training can be transferred to the workplace. The supervisor should have input in the participant selection process, which is described in Chapter 5.

A recurrent theme throughout these chapters is participation. The Training Officer has important responsibilities which can only be realised by seeking out others for their support and participation as stakeholders in the training process. In addition to the major organisational stakeholders listed above, other stakeholders in training include collaborating agencies, donor agency representatives and training participants, all of whom will benefit from reading those chapters that interest them. Their participation in the training process can make an important difference in the quality and long-term impact of training.

Each chapter begins with a list of key objectives for the Training Officer (or whoever the reader may be). They are presented in behavioural terms (as described in Chapter 6); however, simply reading a chapter will not enable training officers to achieve such objectives. 'What's Your Role?' is intended to act as a tool that will encourage the Training Officer (and others) to achieve better results through practice. It is only through practice and adaptation of what is presented here that the Training Officer will be successful in working with others to achieve change.

Reflection questions are presented at the end of each chapter to give the reader some things to think about in the context of what is happening in his or her own organisation. These questions should encourage the Training Officer to begin acting on what has been discussed in each chapter. Reflection questions are displayed under the symbol shown on the right.

Reflection questions help readers put the chapters into perspective. They are indicated with this symbol.



This book is not designed to be a step-by-step instruction manual on training. It is designed specifically to guide training officers in the course of their duties. You are encouraged to use the handbook on a regular basis to get inspiration and ideas which will help you improve your effectiveness.

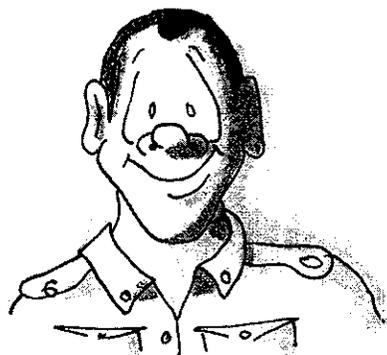
A glossary is provided at the end of the handbook for you to look up terms that may be unfamiliar.

A variety of characters and graphics have been developed to make this handbook memorable and easy to use. The main characters which appear repeatedly in the book are:

Other Important Symbols

Steps for procedures are indicated with number symbols like this ③. Questions you may ask during the course of your work are indicated by this symbol-❓.

Useful examples and case studies are marked with this symbol-📖.



Joseph, a warden with training experience who has had training officer duties for a few years. He supervises a small training unit and is interested in increasing his role in human resource development.



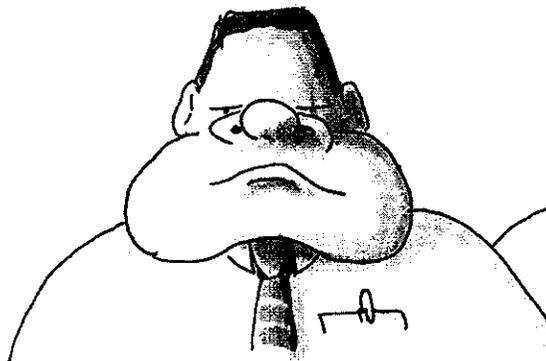
Marie, a newly appointed training officer who is trying to become familiar with her role and the role of her training unit.



Edward, a consultant trainer who has extensive experience working with protected area authorities.



The book contains a wide variety of trainees, including Victor and Annette, who are very interested in how training can help them.



Martin, the senior officer of the protected area authority. He knows that it is important to have educated staff but he is not certain how in-house training can help his organisation.



Robert, the donor representative who has supported training projects for several years.

Section One

TRAINING CONCEPTS and OVERALL PLANNING

THIS SECTION INCLUDES

Chapter 1 Training for Improved Performance
&
Chapter 2 Developing a Training Plan

The first section introduces concepts about training and learning which serve as the basis upon which training policies and plans are formulated for the organisation. It encourages the reader to take a fresh look at the role of training and the benefits training can bring to the organisation. Chapter 1 addresses the need for organisational policies that link training to improved performance. It presents the concepts of **adult learning** as a guide to establishing the most appropriate learning environment, and **behaviour change** to describe the behaviour that is desired as an outcome of training. The benefits of training can only be realised through careful planning. Chapter 2 explores the process of developing a training plan on the basis of identified training needs.

Chapter One

Training for Improved Performance

Our discussion of training begins with the concept of improved job performance. Improved job performance enables organisations to make the most positive impact on protected areas and the many aspects of their management. This chapter describes the link between training and organisational impact to highlight the roles of the Training Officer and the training unit as essential to organisational effectiveness. Concepts will be introduced which will help you to build a foundation for effective training within your organisation. This chapter is designed primarily for training officers, but it may also be useful for supervisors, administrators and trainers.

The Role of Training

Training is a process which helps individuals develop knowledge, skills and attitudes, based on principles of how adults learn best. Training is one of the most important factors which influence the way employees perform and carry out their duties. Effective training programmes approach behaviour change as a learned process. This chapter will present the concepts of behaviour based training and adult learning as means to increase performance. It will also address the numerous factors which influence learning. Through this chapter, you will learn how training activities can be supported by well planned strategies which define how training needs should be addressed.

Organisations such as yours function in a complex environment and face many challenges every day. A high level of performance is expected from employees to overcome challenges and reach institutional objectives. Training is the most direct way of improving performance, especially if it focuses not only on knowledge acquisition but also on the employee's attitudes and the skills required to act. As the Training Officer, you are responsible for ensuring that training is used strategically to strengthen your organisation and improve the performance of its employees.

Improved Knowledge, Skills and Attitudes = Enhanced Performance

To increase job performance, three components of behaviour should be addressed: knowledge, skills and attitudes. Employees must have adequate knowledge, they must be motivated and they must have the skills in order to feel empowered to act. It is not enough just to know facts. Employees should be interested in their work, have positive attitudes towards the tasks at hand and have the skills to act on what they know. Simply put, knowledge, skills and attitudes add up to performance. Therefore, training should focus on all aspects of behaviour in order to improve on-the-job performance.

OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO:

Describe the factors which influence learning.

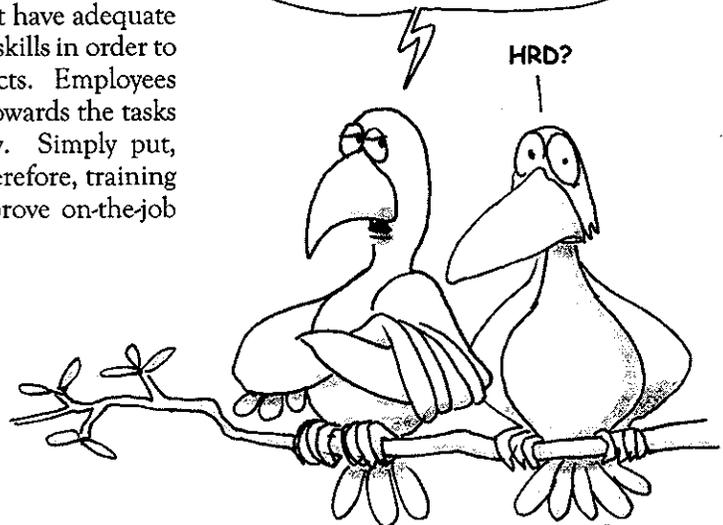
Explain the Principles of Adult Learning.

Describe how training can enhance knowledge, skills and attitudes within your organisation and raise performance.

Establish behaviour change as the outcome of training.

Develop a training strategy to guide performance improvement in the organisation.

By systematically enhancing the knowledge, skills and attitudes of employees we raise performance and contribute to HRD!





Targeting Performance

When addressing training needs within your organisation, it may be helpful to think in terms of the specific actions or behaviour which you hope will result from training activities. Just as your organisation's programmes must realise certain objectives, you can think of training as assisting employees to reach their individual objectives for attaining or exceeding performance standards. Improved performance helps employees to address their job responsibilities and fulfill their role within the organisation.

Training can be defined as 'a systematic development of knowledge, skills and attitudes required for an individual to perform adequately a given task or job.' This definition includes three important concepts which will serve as the basis for our discussion about training:

Training processes should be systematic. Systematic approaches to training make the best use of scarce organisational resources. Good planning demonstrates organisational commitment to effective human resource development, and it leads to the establishment of effective systems for planning training activities. Training processes require careful planning as well as support from a number of organisational levels, especially from the top. A systematic approach to training ensures that all training activities work towards a common goal and help to develop human resources.

Training should address the employees' knowledge, skills and attitudes. It is not enough for employees to be able to memorise theories, procedures and rules. Behaviour and performance is determined not only by knowledge, but also by ability, motivation and attitude. Training must therefore take a much broader perspective than simply teaching people what they need to know - it should help them to change their behaviour.

Training should enhance job performance. It can be a challenge for trainers, training participants and supervisors to link training activities to the workplace, but this link is critical. By accounting for the impact of training on organisational performance, support from senior management and donor agencies can be strengthened. Accountability begins with the planning of training activities based on high priority needs, addressing those needs effectively through training, and then measuring behaviour change.

Human resource development (HRD) is the integrated use of training, career development and organisational development to improve personal and organisational effectiveness.

HRD includes activities which:

- 1 Are designed to produce change in the physical and mental effort people put into their work.
- 2 Are designed to produce behaviour change.
- 3 Attempt to produce greater capability of individuals within the organisation.
- 4 Are designed to help individuals realise their personal potential.

We have a role in developing human resources within our organisation in order to improve performance and reach objectives!





Setting Behavioural Objectives

Objectives which focus on increased job performance are called *behavioural objectives*, or *performance objectives*. It is necessary to set behavioural objectives in order to enhance job performance strategically and effectively.

Behavioural objectives indicate what the participant should be able to do after completing the training. In the context of training events, behavioural objectives indicate what the participant should learn during a particular training session in terms of *behaviour change*. Because the goal is improved work performance, it is necessary to be able to describe exactly what the standards of performance should be. Remember, job competence is measured not only by what a person *knows*, but also by what a person is capable of *doing*.

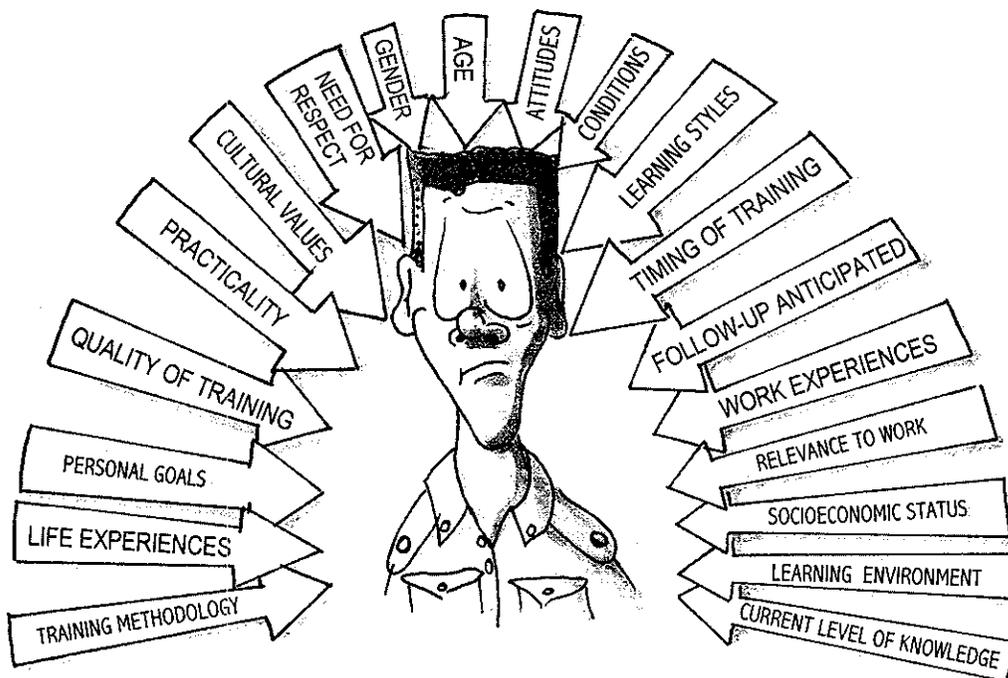
Training which is based on behaviour change focuses on what the employees need to be able to do in their workplace. The Training Officer should be aware of the general knowledge, skills and attitudes expected for each employee to perform effectively and then design training courses to make trainees able to demonstrate what they have learned. Training can be termed successful if it brings about positive behaviour change.



Training should focus on more than just knowledge. It should address the skills and attitudes employees need to perform their jobs well. Training should be based on measurable criteria.

Factors which Affect Learning

There are countless factors which influence the way people learn and no trainer can control all of them. Below are some of the key factors which influence learning in the training context:



While the list of factors may not be exhaustive, it demonstrates that human beings are very complex and that it is a challenge to encourage behaviour change. It also underscores the fact that training cannot succeed by merely providing information. It can also be difficult to measure behaviour and attitude change because the indicators may be subjective.

Adult Learning

Over the years, educational researchers have proposed numerous theories about the way children and adults learn. The study of adult learning emerged at about the same time people began studying human resource development (HRD) within organisations. *Adult Learning* refers to the way adults acquire and use knowledge, skills and attitudes. The Principles of Adult Learning have important implications for the work of trainers and training officers.

Early in this century, when industries were the primary employers in Western countries, employees were viewed as robots who simply required the right stimulus in order to perform well. It was assumed that employees didn't need to think very much in order to do good work. Their attitudes and motivations were not important to employers or trainers. Training at that time was simple and focused on the completion of basic tasks. In the modern world, working conditions are much less predictable and employees are viewed with more respect. As a result, we have witnessed the evolution of a very different approach to training. Today, many complex factors must be taken into consideration for training to be appropriate and successful. Modern training is based on a learning process which addresses critical thinking, skills and attitudes.

Adult Learning and Training: The theory of Adult Learning has important implications for the way human resource development may be approached within your organisation and how training activities should be designed and implemented. An American named Malcolm Knowles, a leading scholar of adult learning, refers to adult learning as *andragogy*, a term that originated in Europe to differentiate adult learning from child learning.

Knowles cites Charles Kabuga, a staff member of the International Cooperative Alliance in Tanzania, "*The advantages of andragogy are many. First, it is a double-barrelled gun with tremendous potential for liberating both youths and adults to believe in themselves, to think and to create. Second, by inviting a dialogue between the teacher and the taught, it puts an end to the long-standing problem of teacher-student contradiction where, in the words of Freire 'the teacher teaches and the students are taught; the teacher know everything and the students know nothing; the teacher thinks and the students are thought about.'* *Andragogy, therefore, shatters the myth that knowledge is the private property of teachers. Because it rightly assumes that no teacher can really teach in the sense of making a person learn, andragogy believes that one person merely helps another person learn.*



Andragogy is the Theory of Adult Learning. By using the Principles of Adult Learning, we can make training more effective and long lasting.

People who remember most may not necessarily be the ones who think more. While remembering is a backward-looking activity, thinking is a future-looking one, and any dynamic society needs more of such future-looking citizens. It is because pedagogy does nothing other than develop the memory of the learner that is it outmoded, either as a tool for education of children or of adults.

(Kabuga, cited in Knowles 1977)

Adult learning is active and participatory. It allows trainees to be more involved in the learning process.

The difference between child learning and andragogy is as follows:

In child learning, the student:	With adult learning, the learner:
Receives information	Offers ideas based on experience
Follows instructions	Acts interdependently
Depends on the teacher	Participates actively
Has little responsibility for shaping the learning process	Has control over the learning process
Is motivated to learn by external forces of society (family, religion, tradition) and does not necessarily see the immediate benefit	Is motivated to learn by him or herself and is able to see the immediate benefit of the training. Often can apply the learning immediately
Has no control over the topics or content of learning. These are set by the teacher	Makes choices which influence learning. Topics and learning content are based on real workplace and life issues



Some people argue that the differences between adult and child learning are not that great.

The Principles of Adult Learning

Adults learn best when learning:

- is self-directed
- fills an immediate need
- is participatory
- is experiential
- is reflective
- provides feedback
- shows respect for the learner
- provides a safe atmosphere
- occurs in a comfortable environment



Principles of Adult Learning



Adult learning should be self-directed: Adults are aware of their own needs and they should share responsibility for their own learning.

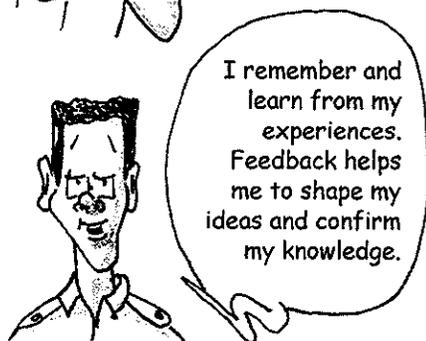
Adult Learning should fill immediate needs: Motivation to learn is highest when learning addresses the true needs of the learner.

Adult Learning should be participatory: Involvement in the learning process should be active. Learners should participate in shaping their training. When adults actively participate in learning, the learning is more effective, memorable and easy to apply.



Adult Learning should be experiential: The most effective learning can be achieved through shared experiences. Adults can learn effectively from each other.

Adult Learning should be reflective: Maximum learning occurs when the opportunity is provided to reflect back upon experiences, draw conclusions, and derive principles for application in the future.



Adult Learning should be built on feedback: Effective learning requires feedback which is corrective and supportive.

Adult Learning is based on respect for the learner: Mutual respect and trust between trainers and learners enhances the learning process.

Adult Learning functions best in a safe atmosphere: A cheerful, relaxed adult learns better than one who is fearful, embarrassed or angry.



Adult Learning can only occur in a comfortable environment: Adults who are well fed, well rested, comfortable and healthy are ready to learn with maximum effectiveness.

The basic Principles of Adult Learning should form the core of your training programmes. Refer to these principles when you plan, implement training, work with trainers and develop strategic approaches within your organisation.

The Unique Role of Training

Many people think of trainers as lecturers but there is a significant difference between their roles. A lecturer's role is to impart knowledge through lectures, readings and assignments. A trainer's role is to respond to identified needs for specific behaviour change and performance. Training increases knowledge, but it extends further to include other aspects of behaviour change. Trainers understand how adults learn and how to structure learning activities which will help them to perform better on the job. Training should do more than impart knowledge. Training should guide learners through activities in which they are required to participate and apply their knowledge.

So Many Ways to Train

There are many approaches to training and each has its own strengths and weaknesses. You should take a broad view of training to include any planned learning activity which leads to enhanced on-the-job performance. There are many different ways to train adults, several of which are described below. Consider the following as elements of your training programme.

Conference - A large meeting on a general topic or theme, usually lasting more than one day. Conferences usually include a selection of smaller discussions, meetings, plenary sessions, speakers and presentations, all happening simultaneously. Conferences are often convened to reach a consensus for the resolution of problems.

Distance learning course - A course where students interact with instructors or professors without ever meeting them. Communication in distance learning courses has traditionally occurred by mail, but it is becoming increasingly common using satellites, the Internet, educational television broadcasts and videos.

Formal academic programme- A series of courses at an educational institution, leading to a degree.

Retreat - A meeting for at least two days in a location away from the work place. Retreats are often used to create a good environment for practical problem solving and team building.

Short course- A short course can run from one day up to six months. It may take place within the organisation or be run by an external institute. Key contents of the course are developed in advance and the course is structured to ensure that all the points are covered.

Study tour- A visit, usually to another country or region, with defined objectives to learn or understand new practices relevant to the participants' jobs.

Workshop - A training activity for a group of people, lasting from one day up to two weeks. Workshops are usually less structured than short courses and allow more opportunity for flexibility in content.

It may be wise to address your training needs with a variety of approaches ranging from workshops to study tours and formal certificate courses.

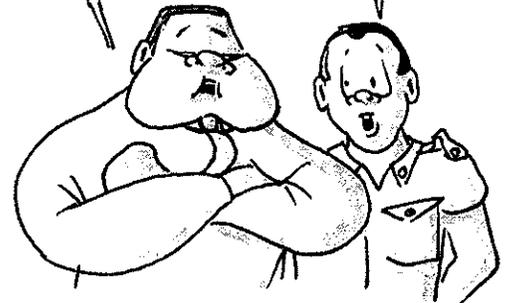
Some of these training needs may best be addressed through workshops followed up by study tours.



Although formal (academic) training is important, non-formal approaches may offer a flexible and affordable way to address your organisation's needs.

I want all my staff to get certificates!

We can act strategically to link formal training with our non-formal approach to improve performance and human resource development at a low cost!



Remember, training strategies should be firm, but flexible. Anticipate that you will modify and improve your strategy over time to fine-tune it to institutional changes and the changing needs of employees.

We heard that you are opening a workshop. We are here to start work.



To train effectively, we will need to think and act strategically.. Strategies ensure that needs are met in an efficient and innovative manner.



Focus On Workshops and Short Courses

Training workshops and short courses offer an effective, low cost method for raising the performance of a wide variety of employees within an organisation. Both are highly visible and popular among employees. Most organisations rely on workshops as their primary tool for improving on-the-job performance and this handbook focuses on how to make the best use of workshops to promote skills development. However, training workshops alone cannot bring about the desired behaviour change within organisations and other training methods have important roles to play.

Strategies for Training

Training strategies establish policy and set guiding principles of how training needs should be addressed. Training strategies are developed to address key training and human resource development issues. Effective strategies should address the following questions:

- ❶ What is the purpose of training within the organisation?
- ❷ Will training address knowledge *and* skills *and* attitudes to improve performance?
- ❸ Should training activities include a variety of approaches for meeting training needs?
- ❹ Are there guidelines for training within departments?
- ❺ How will priority training needs be identified?
- ❻ Are training plans required? At what level?
- ❼ What is the role of the training unit?
- ❽ What is the role of trainers?
- ❾ How is training linked to supervision?
- ❿ What documents and procedures will facilitate and track training and performance improvement at the individual employee level?

Why have a training strategy? Develop a training strategy in order to establish a set policy and approach to training for your organisation. Use your strategy as a guide when developing training activities. Use your strategy for direction and as a tool for monitoring and evaluation.

❶ POLICY STATEMENT EXCERPT: The Role of Training from the College of African Wildlife Management, Mweka, Tanzania.

The organisation believes that appropriate training is essential in making employees perform their duties to their highest capabilities. Appropriate training is expected to provide employees with skills and knowledge required for better performance on their jobs. This should enable employees to give increased quality job performance as may be reflected in their performance appraisals. Therefore, the organisation recognises any training that is aimed at achieving this objective and may include orientation, short term, on-the-job, attendance at seminars, conferences and workshops, attachments, and long professional training in line with the job description of the employee.

E TRAINING STRATEGY DOCUMENT EXCERPT: Uganda Wildlife Authority.

The organisation has established that the role of training within any organisation is primarily threefold:

1. to ensure that the organisation has people with the correct mix of knowledge, skills and abilities
2. to provide learning opportunities and to motivate people to learn
3. to enable performance at the highest levels of quality and service

The Training Coordinating Unit (TCU) will function to coordinate all training activities undertaken for staff across the whole authority--at organisational, departmental and individual levels. The TCU's primary role will be coordinating the development and implementation of training plans. This primary role includes ensuring that training events correspond with needs, overseeing effective design and implementation of training, and monitoring and evaluation. The TCU's role will be most important at the departmental level, to provide the technical assistance required for identifying training needs, maintaining training records and reports, developing systems to track funding for training, and developing systems for allocating training funds to departments.

The organisation's principles articulate a clear philosophy about training, and they will serve as a basis for all training activities:

- training needs to be tied to functional areas
- training should be on-going throughout an employee's tenure
- a mixture of approaches/methods may be needed
- heavy emphasis should be placed on skills orientation (recognising that staff will have basic knowledge at entry level)
- the internal capacity to do training should be recognised and utilised
- local availability of training is important and should be used preferentially
- training plans should be designed to reflect the reality of potential funding sources

There are three levels at which training takes place:

1) **Organisation level Training**

These are knowledge areas, skills and attitudes that are needed across the whole organisation for most staff from different departments. These learning areas can be categorised as core competencies and includes areas like: understanding the organisation, working with colleagues, planning cycle and work quality, communications skills, and time management.. There will also be a need for organisational management training for several posts. Training will take place mostly in-house, but some senior level courses may be conducted by external trainers. Funding for these courses should come from the organisation's core budget and not from external sources, if not in the first years, at least as a future goal.

2) **Department level Training**

This training is specific to the various departments of the organisation. The Training Coordination Unit will need to work with the line managers of each department to develop a department level plan. Training at this level should take place in the form of in-service training workshops and structured on-the-job training. Some departments may also develop core courses, focusing on technical aspects unique to the department (eg. community conservation syllabus for implementing park management plans). For this component of the training strategy to succeed, it is crucial to ensure understanding and commitment by the departmental managers to participate actively in coordination of training and follow-up training activities in the work place.

3) **Individual level Training**

Individual level training is synonymous with personal development, defined as optional courses negotiated between employee and supervisor and tied to both personal and organisational needs. A primary benefit of this kind of training is personal motivation. Individual level training will take lower priority than organisational and department level training.

REFLECTION QUESTIONS

Is your training based on behavioural objectives?

Do you use the Principles of Adult Learning?

Have you considered a variety of training options to address your organisation's training needs?

Has there been a training policy developed for your organisation?

SUMMARY

This chapter addressed the basic learning principles which the Training Officer must understand to fulfill his or her role within the organisation. The role of the Training Officer is central to the organisation's ability to function effectively and to achieve the desired impact. The many factors which affect learning show that training should go beyond the transfer of knowledge to address attitudes, motivation and skills to change behaviour and to increase job performance. Behaviour based objectives and adult learning theory help the Training Officer to establish a firm foundation for training programs.

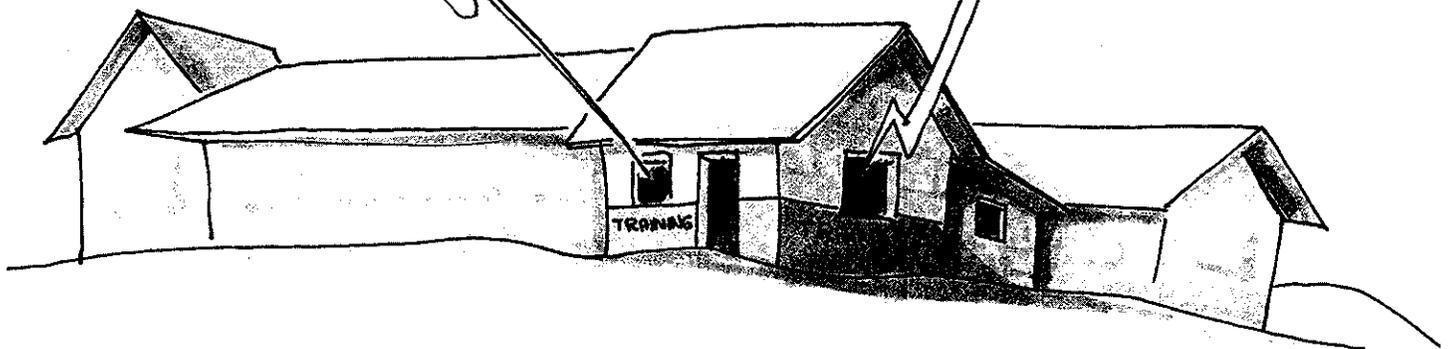
Adult learning principles (andragogy) were introduced and compared to the traditional approach to classroom education. Adult learning theory emphasises that training should focus not only on knowledge but also on the skills and attitudes of participants. Training should consider the conditions of participants' work places and enable participants to develop both thinking skills and manual skills. Application of these principles will help to ensure that training activities lead to behaviour change. In the end, training must improve the way employees perform on the job.

Organisations should articulate the role of training with policy and strategy statements. Clear policy provides the mandate for the Training Officer to develop human resources in the organisation, while the strategy clarifies the approach training will take at all levels in the organisation.

An understanding of basic concepts and organisational policies for training helps the Training Officer establish a firm context within which he or she can develop the training plan and oversee implementation of training activities. The next chapter will provide practical guidance for developing a training plan based on identified needs of employees.

Joseph, now I understand that we need a policy and a strategy to develop effective training.

That's true, Marie. When running a training unit, it is often difficult to keep sight of the organisation's overall goals and objectives. The policy and strategy will help us to focus our training activities and guide us on how we will address our institution's needs.



Chapter Two

Developing a Training Plan

Training plans outline how organisations carry out training activities strategically to provide appropriate and affordable in-service training to employees. A plan will show which employees should receive which type of training. A training plan differs from the training strategy in that it is much more focused and it targets the specific needs of employees. It may not be practical for your organisation to develop a training plan which addresses *all* the training needs of all employees; therefore, the training plan should focus on training activities which are of the highest priority for your organisation. This chapter will focus on steps for creating training plans based on established job descriptions and identified needs. It is designed for use by training officers but it may also be a good resource for supervisors, administrators and trainers.

Good training plans are a challenge to develop and they should be kept simple and realistic in terms of time and resources available. Most importantly, each training plan should be based on the identified, high priority needs of employees within the organisation.

There are four basic steps to developing training plans:

- 1 List the duties of the person(s) to be trained
- 2 Conduct a task analysis
- 3 Carry out a training needs assessment
- 4 Analyse and select training options

In this chapter, we will explore each of the above steps. Adjust the planning steps for use in your organisation. As you go through the process, consider what resources are available to you and what information and documentation exists to support your planning. Keep the process simple and remember that, by addressing each of these steps even in a small way, your training approach will be vastly improved.

Step 1: List the Duties of the Person(s) to be Trained

Job descriptions are documents which indicate the job title, duties, performance standards, supervisory relationships, and the qualifications and skills required for each position within your organisation. They are most often used in recruitment, but job descriptions should also play an important role in performance appraisal and in developing a training needs assessment.

You should be aware of the specific duties of prospective trainees. Job descriptions are the starting point for determining what employees *should* be doing. If the job descriptions in question are not up to date, additional work will be required to determine what is currently expected of employees.

OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO

Identify priority training needs for cadres of employees within your organisation.

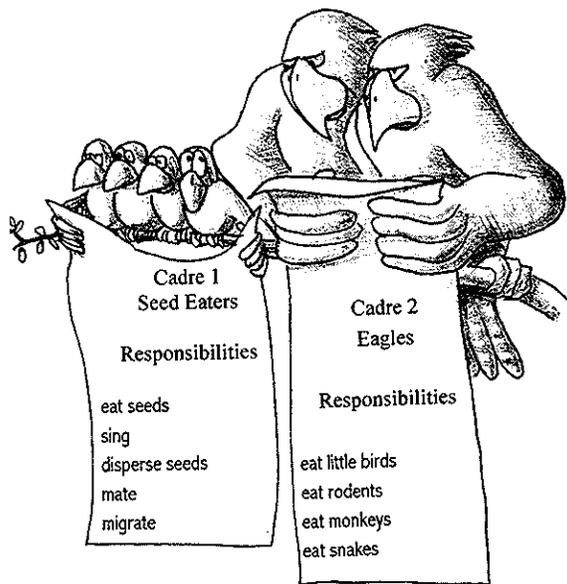
Analyse employees' duties in terms of the requisite knowledge, skills and attitudes.

Use a combination of appropriate tools to conduct a training needs assessment.



Since responsibilities and duties change over time, job descriptions may require periodic review and updating.

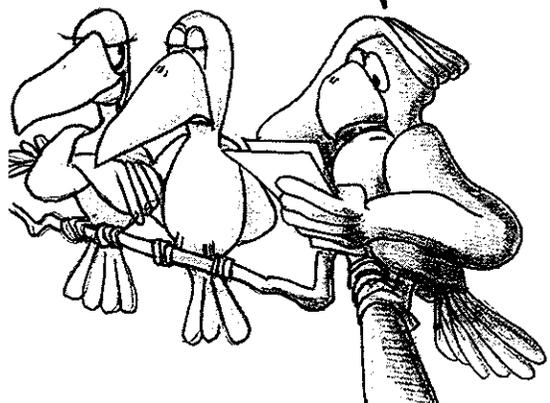
Listing responsibilities is not usually done on an individual basis, but by cadre.



By the end of Step 1, you should have a very clear picture of what is required of the position in question.

You may wish to compare job descriptions from related jobs or jobs which are interrelated to ensure that they link well and support each other.

According to these job descriptions, she makes the nest, lays the eggs and raises the chicks while you just fly around!



The duties of prospective trainees should be clearly defined and listed. These duties are sometimes referred to as tasks, responsibilities or activities and your primary goal should be to determine which main tasks, responsibilities and standards are required of the position in question. Once the tasks and responsibilities have been listed, you are ready to conduct a task analysis.

E JOB DESCRIPTION EXCERPT: MAIN DUTIES OF A PROTECTED AREA MANAGER. PARCS Training Needs and Opportunities Among Protected Area Managers in Eastern, Central, and Southern Africa

The Protected Area Manager Should:

1. Ensure the availability of competent and well motivated staff
2. Ensure appropriate infrastructure within budget
3. Ensure financial and accounting integrity of the protected area
4. Ensure development and achievement of tactical plans and budgets and contribute to protected area strategic planning
5. Ensure that all activities within the protected area comply with laws and regulations
6. Ensure optimum levels of visitor satisfaction
7. Ensure agreed intervention programmes (e.g. early burning, problem animal control) are completed to budget and timetables
8. Ensure harmonious relationships with neighbouring communities
9. Be aware of research activities and progress against plan
10. Represent the protected area and its interests in public meetings
11. Ensure an appropriate balance between resource conservation and use in the protected area

Step 2: Conduct a Task Analysis

Task analysis is an exercise whereby the main tasks (referred to here as duties) of a cadre of employees are defined in terms of knowledge, skills and attitudes. It answers the following questions: 'To carry out this particular job, what knowledge is required? What skills are needed? What attitudes will enable the person to work effectively?'

Task analysis is used to determine which knowledge, skills and attitudes are required by employees to conduct their duties well. By analysing the tasks, you can obtain the information required to conduct a needs assessment and focus on the specific training requirements of employees.

To conduct the task analysis refer to lists of duties produced in Step 1. Focus on each duty and determine:

- Knowledge What basic information does the employee need to carry out this duty?
- Skills What does the person have to be able to do to complete the duty to standard?
- Attitudes What demeanour or conduct should the person have in carrying out this duty?

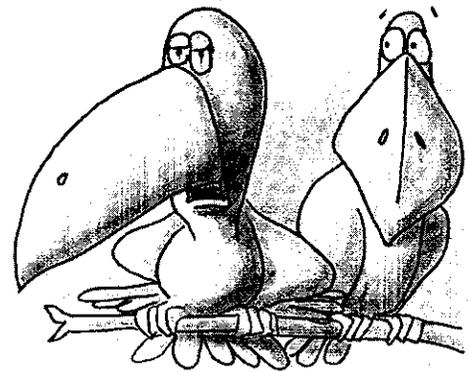
Ranking Skills. One way of making a task analysis more quantifiable is to develop a ranking for the level of skills required. If you record the rank as part of the task analysis, this will help you later on when you develop your training plan.

Example

Skills	Ranger	Sergeant	Assist. Warden	Warden	Senior Warden
Working with colleagues	3	3	3	3	3
Communication	2	3	4	4	4
Time management	1	2	3	4	4
Decision making	1	2	3	4	4
Understanding natural systems	3	3	4	4	4
Policy formulation	na	na	1	2	4
Strategic planning	na	1	2	3	4
Budgeting	na	1	2	3	3
Managing people	1	2	2	3	4
Field craft	4	4	2	1	1
Leadership	1	4	3	3	4

Key Level of skill required
 for 4= Expert
 ranks 3= Competent
 2= Basic
 1= Aware of
 Na= Not applicable

Being a Hornbill requires very specific knowledge, skills and attitudes.



Each cadre values specific skills differently. By ranking skills, you will be able to see which skills are most important to each cadre.

And you will be able to identify which critical skills are common to several cadres.

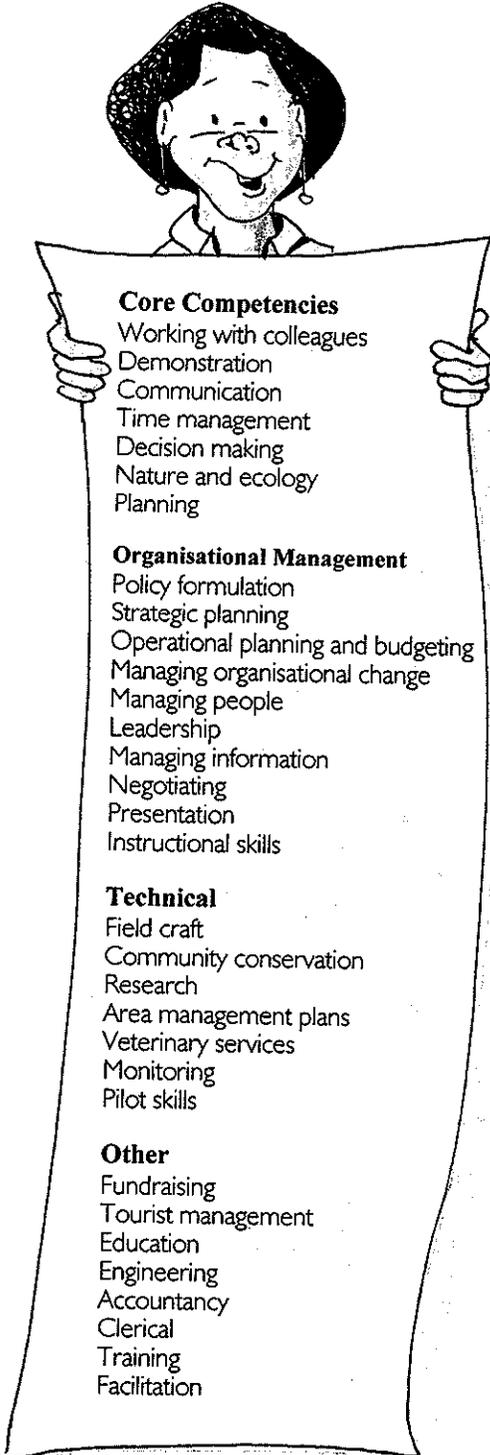
According to my analysis, all cadres must be competent in working with colleagues. We could conduct this training for all cadres at once.



Now I have an idea of what types and levels of skills are required for each cadre. It is time to see what skills currently exist.



Consider more than just technical skills. Think about the broad range of skills required for employees to perform well. Here's a sample list of skills to consider.



EXAMPLE OF A TASK ANALYSIS: *College of African Wildlife Management, Mweka, Tanzania.*

This example shows what knowledge, skills and attitudes are required of a warden in relation to policies and legislation.

Knowledge (What the warden must know)

- existing wildlife policies and legislation, including the structure of law enforcement and the warden's responsibilities
- process of formulating policies and legislation
- mechanism of bilateral agreements, including how they are initiated
- new and emerging wildlife conservation concepts, including problem identification, programme development
- role of politics in wildlife management
- court procedure and prosecution techniques
- customary /traditional law
- policy implementation procedures
- compatibility of sectoral policies and legislation
- policy review process and policy evaluation
- resource economics

Skills (What the warden must be able to do)

- follow procedures for law enforcement, including apprehending and arresting poachers
- educate and influence policy makers
- problem solving
- manage staff for maximum law enforcement, including delegating responsibilities
- interact effectively with communities, the general public and donor agencies
- assist in the revision of outdated and/or ineffective legislation and policies

Attitudes (What the warden must show in his/her approach to work)

- diplomacy and tact
- self-confidence
- participatory management
- participatory community decision making

In Step 1 of your training plan development, you made a list of duties required of a specific job in your organisation. In Step 2, you assessed the knowledge, skills and attitudes required to accomplish those duties and you classified them with a simple ranking system. Now you are prepared for *needs assessment*, a process which identifies performance gaps and focuses training on the specific needs of employees.

For example, a needs assessment might show that rangers know quite a lot about a community's impact on a protected area, but at the same time they lack the required skill level for working with the communities. The Training Officer can use this information to design training activities which focus on practical communication skills and approaches for working with communities.

According to this needs assessment, you are supposed to be swooping, slashing and pecking but you are actually swooping, slashing and bashing! Now we have to focus on your pecking.



Step ③: Carry Out a Training Needs Assessment

Through a training needs assessment, the information gathered on the knowledge, skills and attitudes of cadres of employees is used to determine the difference between what people are *doing* and what people are *supposed to be doing*. When employees work at a performance level below what is expected and required, there is a performance gap. Training can help to narrow the gap - it can help people perform at the highest standard possible.

To determine what employees should *ideally* be doing, one can refer to job descriptions and task analysis. Every employee has areas where he or she should be able to improve performance if provided with the right training. The needs assessment process helps you to determine what kind of training is required by each group or level of employees.

By comparing the desired performance level for this cadre with their actual performance we can identify key gaps for our training to focus on. To do this, we must choose the right assessment methods to gauge knowledge, skills and attitudes.

To conduct a needs assessment, you must address two key questions:

- ❶ What level of performance is desired to meet performance standards?
- and
- ❷ What is the actual level of performance?

Job descriptions and task analysis help to describe desired performance. Now it is necessary to collect information on the way people are actually performing.



It is important to choose techniques which you and your target group will feel comfortable with and methods which you will feel confident in using.

I recently conducted a needs assessment with senior wardens. I wanted to collect information based on their attitudes towards tourism services so I considered interviews, focus group discussions and attitude surveys.

I did not feel comfortable conducting a focus group discussion with such senior stakeholders and I was doubtful that this method would provide useful information for focusing training. I ultimately chose interviews because I felt that the method would be participatory enough to provide useful information and viewpoints which the survey might not.

Although the interviews were effective, they took more time than I anticipated and I was unable to reach some out-posted wardens. Through the process, I discovered some high priority needs which I will discuss with my colleagues before moving forward.



How to Select Needs Assessment Methods

A number of methods and sources are available as means for collecting information on training needs, including attitude surveys, questionnaires, performance appraisals, interviews, focus group discussions, training committees, training records and feedback from management. You should consider which methods are most practical and appropriate for use in your situation. To select an appropriate method, use the 'PUP' criteria. According to the PUP criteria the methods you select should be:

Practical Useful & Participatory

Practicality: When considering needs assessment options, ask: are the methods **practical** for you to use? Consider:

Time: Most likely, you will need the results of your assessment as soon as possible and some methods are more time consuming than others. When you select your method(s) consider how long it will take you to develop your approach, collect the data, analyse it, and put it into a form which is presentable to others. How much time out of your busy work schedule can you (and others) allow? Will the respondents/information sources have time for you?

Costs: Each method has a different cost but, with careful planning, you should be able to conduct an effective assessment with very little money. Determine which options you can afford.

Access to information: To conduct a needs assessment, you must have good access to your target audience. Employees who live far away may only be reached by letter, or possibly by telephone. In this case, your choice of options may be limited. Alternatively, you may plan your needs assessment at times when people are most accessible.

Usefulness: When considering needs assessment options, ask: will the information collected be useful?

Think about the people to whom you will present your findings, once the needs assessment is completed. What kind of information do you think will be most convincing to them? It is often useful to combine qualitative (opinions, attitudes, perceptions) and quantitative (statistics, percentages) information for balance. Senior level managers may be more receptive to the most objective information on performance you can provide ~ emotional pleas for more training might not be as effective.

Participation: When considering needs assessment options, ask: will others *participate* in the needs assessment process?

The impact of training will be greater if the participants agree that the training is a priority need. Contributing to the training process (or course content) will improve course quality and foster a feeling of 'ownership' in the training process.

Effective Needs Assessment Methods and Information Sources

Consider the following methods and information sources for your needs assessment.

Attitude Surveys. Attitude surveys may be used to measure the level of satisfaction among employees. They can be conducted in written or verbal form and they focus on the perceptions and opinions people have about their work. These opinions may be used as indicators of training needs. By using this method, management shows its concern for employees' opinions and interests. Attitude surveys may help to raise morale and increase two-way communication between employees and management.

Questionnaires. Questionnaires are documents containing a series of questions which require written answers. The questions may be short-answer (yes/no), rating scale, multiple choice, or open-ended (for recording opinions). Questionnaires can be administered to the prospective trainee (for self-assessment) or to their supervisors (for supervisor's assessment). For the purposes of needs assessment, questionnaires are typically used to rate performance levels in knowledge, skills and attitudes for all job responsibilities. Questionnaires may ask how important each duty is or how frequently each is carried out and this information may be useful later when prioritizing training needs. Questionnaires are particularly useful methods for reaching individuals who live far away and are not readily accessible.

Interviews. Interviews are similar to questionnaires but they are based on dialogue rather than written answers. Because they are verbal, they are more flexible and open-ended and they provide more opportunity for recording opinions and perceptions. The interviewer prepares a written list of questions which are the same for each interview. The questions are read out to each employee, and the interviewer can take notes or record the answers directly. Interviews provide more in-depth information than questionnaires, because the interviewer is able to clarify the answers provided. They are also advantageous in the sense that interviewees feel directly involved in the needs assessment process and the design of their own training. Keep in mind that interviews are time consuming and they may not be practical in instances where prospective trainees are posted far away.

Performance Appraisals. If performance appraisals are commonly used in your organisation, they will provide a good source of information on the needs of prospective trainees. Performance appraisals are evaluations of employee performance, carried out by supervisors or colleagues. The appraisal typically gauges the performance of the employee against his or her job responsibilities. Some appraisals include supervisors' recommendations for future training needs. Appraisals may also include a ranking system for judging how well duties are carried out or how well performance objectives have been met. This method is particularly effective when it is carried out with a number of employees who work at the same or similar levels. It will not be practical to select this method if performance appraisal systems are not well established in your organisation.

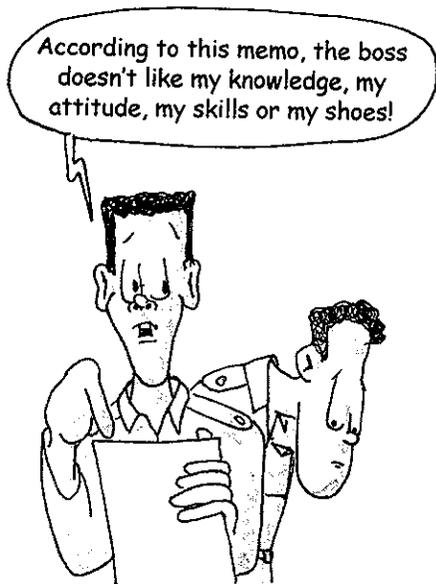


During attitude surveys, avoid raising false expectations among the target audience. Be very clear about the purpose of the survey and who will see the results.



Interviews are flexible and good for gauging attitudes. Unlike less participatory methods, they allow you to clarify and explore difficult issues.

It is advantageous to include supervisors in the needs assessment process. Involve them and listen to their opinions. If they are involved, they will be more likely to support training activities and follow-up activities.



Feedback from management may offer a fresh perspective but it may not be entirely objective. It is recommended that feedback be augmented by other, more objective methods.

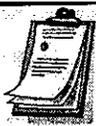
Records Relating to Training. While performance appraisals may be very useful to the Training Officer, a study of other documents will provide additional or alternative information about how employees are doing on the job and what training they have already undertaken. These include training records, supervisors' reports, trip reports, workshop reports, feedback from tourists (registers, complaints, letters), and statistics from protected area manager reports (number of tourists, community based conservation activities, extent of poaching). This method is relatively inexpensive because the data already exist and such information can be quantified easily.

Training Committees. Training committees are panels which review the task analysis and provide advice on targeting and prioritizing training. The committee should be composed of representatives from different levels within the organisation who are generally aware of the needs of the prospective trainees. Their goal is to assess the requirements of positions within the organisation and the training needed to fill performance gaps. Training committees function best when they have tangible quantifiable data to review as the basis for decisions.

Feedback from Management. Managers often voice their feelings about employee performance, whether such information is solicited or unsolicited. It is useful to document this information and consider it during the needs assessment process. Feedback, however, may be subjective and lack the involvement of the prospective trainees. Special care should be taken to validate recommendations made through feedback.

Focus Group Discussions. This highly participatory method may be useful for addressing difficult issues. It may also be an ideal method to introduce new ideas and to involve a wide variety of stakeholders in the design of training. Focus groups may also be used to confirm needs assessment results produced through other methods such as surveys or questionnaires. Focus group discussions involve approximately 5-12 people who are invited to express opinions on a selected topic. The group gathers to discuss a key issue presented by the facilitator. Once the discussion is underway, the facilitator keeps the discussion active and productive by asking questions which explore the topic, posing probing questions for greater clarification and providing added information when required. The facilitator should not otherwise participate in the discussion or influence what people say. Focus groups may not always be practical but they offer a dynamic way to identify and discuss training needs.

Try not to focus on just one method for your needs assessments. Use a variety of methods based on the level of practicality, usefulness and participation required.



Step ①: Analyse and Select Training Options

This is the final step in the development of your training plan. It is also the most challenging. To initiate this step, you must carry out Steps 1, 2 and 3 with every relevant level of personnel. You must have accurate information on the duties, performance and training needs essential to the functioning of your organisation as a whole. Depending on the size and complexity of your institution, the results from Steps 1, 2, and 3 may be quite daunting and difficult to prioritize.

Use the information you have to identify any gaps between the current and the required skills. It is then necessary to assess the importance of the skill or function within your organisation. Do this by considering the significance or possible consequences if a particular gap is not addressed. Decide if competence in these areas is required to help your organisation develop, and identify any areas which must be tackled immediately.

It is at this stage that the training needs from every level will be integrated into a comprehensive training plan and it is important to involve a variety of stakeholders and departments within your organisation in order to develop a training plan which is practical, effective and well supported by your peers and superiors.

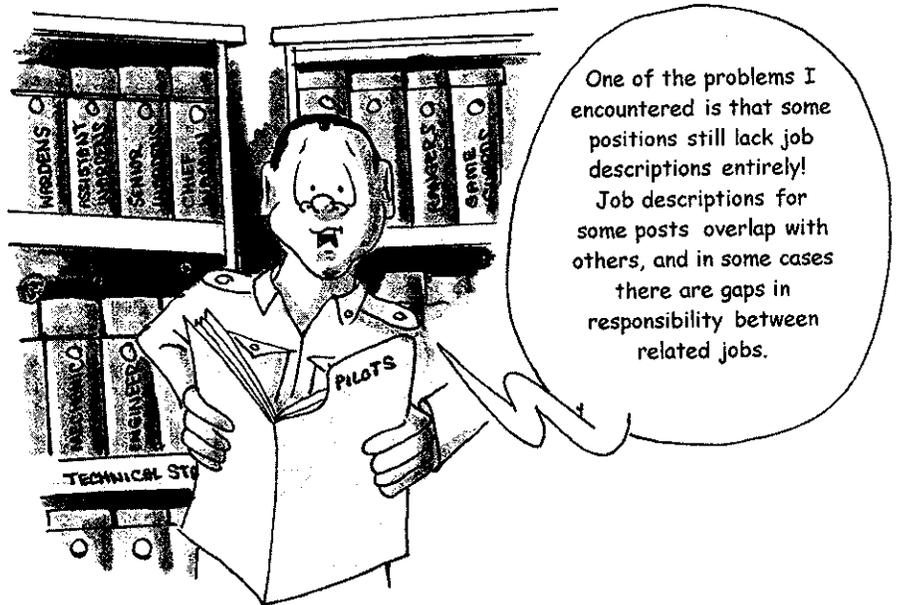
Step 4 involves combining all the information from Steps 1-3 to determine your organisation's training priorities. By the end of the step, you should be able to create a training plan to address those priorities and fill critical performance gaps.

There is no magic formula for getting all the training priorities right, you just need to ensure that you have involved people who understand the organisation's objectives. Make sure you give them well presented data and then identify priority areas.

Are You Ready to Create your Training Plan?

STEP ① First, I researched the job responsibilities for each cadre of my organisation. I was interested in learning what was expected of each position in the organisation. I wanted to discover what specific tasks and responsibilities were required.

I knew that each employee is different and approaches his or her job in a different manner so I was careful to review job descriptions by cadre rather than by individual. Soon I had job descriptions on file for most levels of my organisation and I grouped them by department.





STEP 2 Then I conducted a task analysis to determine what knowledge, skills and attitudes are required for each position. To make planning and prioritizing easier, I ranked each skill by level. I noticed that there were skills common to several different cadres and others skills which were highly specialised for specific positions.

SKILLS	CADRE	
	RANGER	WARDEN
PLANNING	3	4
LEADERSHIP	3	3
MANAGEMENT	2	4

STEP 3 I then used the job descriptions and task analysis to compare the desired level of performance for each cadre to the current level of performance. I conducted a needs assessment for most positions and I located several key performance gaps.

Due to time and budget constraints, I was not able to conduct a needs assessment for each position. I was also not able to reach all the key stakeholders. To complete the assessment, I consulted my training committee. They were very helpful.

STEP 4 By the time I was ready for analysing and selecting training options I was aware of training needs throughout the organisation. I realised, however that there were far too many training needs to address and I had to find some way to prioritize and organise them. I developed a number of considerations for prioritizing training needs and, together with the training committee, we reviewed the list of performance gaps to determine which training needs were most critical to the organisation. We focussed on needs which had to be filled in order for the organisation to function properly as well as training which would directly address organisational goals.

There are some needs common to several departments and task areas where cadres must interact.

I believe that senior wardens require additional training on strategic planning.

It is absolutely critical that we build community conservation skills among wardens if we are to meet our goals.

I also recommend postponing the advanced accounting training since we already have adequate skills in that area.

We also considered the organisation's current issues and priorities. We prioritised the needs by department and then combined each department's primary needs to develop priorities for the organisation as a whole. We considered which needs had to be addressed first. We considered what training expertise is available to address these needs, in-house and in-country. We also weighed the costs of training against the amount of financial support available.

It would be wise to train on aircraft maintenance before we focus on pilot training.

Yes, and I believe that several donors are interested in that topic but we will have to hire specialised trainers

The end result of the process is a chart which identifies and ranks the organisation's training needs. The committee and I will consult this chart when developing the training plan.

Sample Prioritized Chart of Training Needs

Skills	Cadre								Total Priority
	Ranger	Sergeant	Assistant Warden	Warden	Senior Warden	Pilot	Planner	Mechanic	
Working with colleagues	3	3	3	3	3	2	3	3	***
Communication	2	3	4	4	4	2	2	1	**
Time management	1	2	3	4	4	4	4	3	**
Decision making	1	2	3	4	4	4	3	2	**
Understanding natural systems	3	3	4	4	4	2	3	1	**
Policy formulation	Na	Na	2	3	3	Na	3	Na	*
Field craft	4	4	3	2	2	3	2	2	**

4= expert, 3= competent, 2= basic, 1 = aware of, Na = not applicable
 ***= high priority **= medium priority *=low priority for the organisation

Before continuing, it may be wise to consider that training is not always the solution to filling performance gaps. Below is a good example from Tanzania.

IS TRAINING THE SOLUTION? *Ideas from the College of African Wildlife Management, Mweka, Tanzania, and PARCS project staff, Congo*

A regional training needs assessment suggested that protected area managers lacked information on policies and procedures in protected area management. Two countries, Tanzania and Congo, made different decisions about how to address this training need.

In Tanzania, a meeting was held in which the regional needs assessment findings were discussed in order to develop a training plan. It was recognised that the problem of knowledge about policies and procedures was more a lack of information dissemination and not so much a question of skills needs. As a result, the group decided that training was *not* the most appropriate way of addressing the need--it was viewed as a management problem rather than a training problem.

Through discussions in Congo of the same regional needs assessment, a decision was made to develop a guide for protected area managers with complete practical information relating to laws, policies and procedures.

Keep in mind, when prioritizing training, that many factors besides the need for expertise contribute to the ranking of each training topic. Factors may include organisational goals, current organisational needs, availability of funding, availability of training expertise and the sequencing of training.





Training Plan Action Points

To develop my training plan, I need to:

Agree on needs

Prepare a list of needs to address.

List topics

Decide on and discuss topics to address each subject area and determine which ones are most important.

Decide on type of training

Choose the most appropriate training approaches for each topic.

Prioritize

Determine which training events are most important.

Consider funds

Consider how much financial support is available and what type of training it can be used for. Match training with funding opportunities.

Schedule

Take all these factors into account and schedule my training activities.

The result is my training plan.



What is a Training Plan?

A training plan is a document which presents a structured programme to ensure that all staff receive adequate and appropriate training to prepare them to undertake their assigned duties at a defined level of aptitude. Plans differ from strategies in that they are more detailed and indicate specific training for specific audiences. Training plans should be developed with participation from key stakeholders (especially senior management). In fact, training plans may be developed during the same workshops in which training needs are validated and prioritized. Examples of training plans can be found on the following pages.

To create your training plan, take the following actions:

- ❶ Agree on the training needs which have been identified through Steps 1, 2 and 3 and determine which needs could be best addressed through in-service training.
- ❷ List the topics to be included in the in-service training plan. Consider including sub-topics to be more precise. Some of the topics may be joined with others for one single training event.
- ❸ For each training topic, determine the kind of training which should occur and the duration of the activity. Make a rough estimate of the time required to prepare, conduct and follow up each activity and the costs involved.
- ❹ Determine which training activities are high priority (i.e., those that need to occur in the short term) and low priority (those activities that can take place later on).
- ❺ Consider your resources in terms of manpower and funds.
- ❻ Place the proposed activities on a schedule.

Training plans should contain the following components:

- ✓ an assessment of the 'gaps' between the required level of performance and the current performance for the job being appraised
- ✓ a review of the best way to eliminate the gap
- ✓ an analysis of priorities. This is usually a list of gaps which require immediate attention
- ✓ all the topics which need to be covered to address the training gaps
- ✓ an indication of whether the skills needed to support the training exist in-house or if external trainers will be needed
- ✓ a budget for the events and an indication of the target audiences (see Chapter 6)
- ✓ a schedule

See the following examples for ideas on how to develop your training plan.

▣ TRAINING PLAN FOR THE PROTECTED AREA MANAGER CADRE: PARCS project staff, Malawi.

Following an inter-regional needs assessment, two workshops were organised with the following objectives:

- disseminate the findings of the inter-regional needs assessment
- introduce proposed training activities to the department in which the project operates
- evolve a workplan for training activities

Each workshop followed a similar format that enabled the group to learn about the needs assessment findings, discuss their own perceptions of training needs, and develop a list of topics to incorporate into the training plan. Two workshops were conducted with two different groups, in order to keep the number of participants in each group small enough for in-depth discussions. The conclusions of each group were quite similar.

By the end of the two day workshops, the groups had developed a training plan that included major subject areas, course titles, type of training, training duration, and proposed institutions. In the end, one workshop group proposed courses that were ranked by priority, with a time period for carrying out the training:

Category A: April - September 1995

- human resources management
- planning
- legal skills
- law enforcement
- maintenance/handling of equipment
- computer training
- statistics
- visitor management
- concessionaires management
- extension techniques
- public relations
- resource production
- community conservation

Category B: October 1995 - February 1996

- stores management
- wildlife products
- marketing

Category C: March 1996 and onwards

- preservation of scientific specimens
- policy formulation
- capture techniques
- ecological monitoring

E SAMPLE TRAINING PLAN: *Uganda Wildlife Authority*

Subject Areas for Training

- 1 orientation
- 2 organisational management
- 3 planning and budgets
- 4 community conservation
- 5 wildlife refresher
- 6 legal
- 7 public relations
- 8 research
- 9 politics and procedures

Levels of Employees Included in the Training Plan

- I. Rangers and Guides
- II. Those who implement policy and whose duties frequently include team leadership (First-line Supervisors, Technical Officers)
- III. Those who manage activities, develop and implement local policy, and are generally mid-level supervisors or mid-level managers (Headquarters Coordinators, Protected Area Wardens)
- IV. Those who set national direction, lead an organisational unit, and serve in prominent leadership positions (Senior Managers, Directors, Deputy Directors)

Levels of Competency

Training participants need different levels of competency within the same topic area, depending on their level of responsibility and frequency of activity within a topic area. These levels were identified as follows:

1. *Expert:* Knowledge, skills and abilities to fully and independently identify and analyse opportunities and needs in complex and routine situations, develop interdisciplinary solutions with appropriate specialists, and train other personnel in the principles, terminology and field practice of the subject matter area.
2. *Working:* Knowledge, skills and abilities to evaluate components and results of activities, independently identify and analyse opportunities and needs in most situations, and develop interdisciplinary solutions with appropriate specialists.
3. *Recognition:* Knowledge, skills and abilities to recognise components and results of activities, identify opportunities and needs, and refer these to appropriate specialists.
4. *Awareness:* Exposure to components and results of activities with no responsibility to evaluate needs and opportunities.

Training Activities

The Training Committee considered the following questions to determine how training would take place within each topic area: Was a workshop the most effective and efficient approach for every topic area? What about on-the-job training? Briefing documents? Technical assistance?

Time Frame

A schedule based on the four quarters of the year, over a four-year period.

E EXAMPLE TRAINING PLAN- YEAR ONE

	TRAINING STRATEGY/METHODOLOGY	YEAR ONE MTHS 1 - 3	YEAR ONE MTHS 4 - 6	YEAR ONE MTHS 7 - 9	YEAR ONE MTHS 10 - 12
CORE COMPETENCIES	Course and type of training				
understanding our organisation	CCW1 workshop with ext consultant	A to C, E, F	D, G to A1 x2 PAs	D, G to A1 x2 PA	D, G to A1 x2 PA
working with colleagues	CCW1				
planning cycle and work quality	CCW1				
showing colleagues how	CCW1				
communication skills	CCC1 short course at HQ and in PA by national consultant	A to C, E	D, F to P x2 PA	D, F to P x2 PA	D, F to P x2 PA
time management	CCC1 on the job training and supervision		A-F		
creativity					
decision making	CCC2 - short course presented by national expert	F	E	A/B	C
understanding nature	CCW2 workshop per PA (Chief R/M Officer)	D to F	G to A1 x2 PA	G to A1 x2 PA	G to A1 x2 PA
reducing environmental impact	CCW2				
ORGANISATIONAL MANAGEMENT:					
policy formation	OMC9 - 3				
strategic planning	OMW1 - Planning TA facilitates dev wkshp		A	B, C	F
operational planning/budgeting	OMW2 - Planning TA facilitate dev wkshp	F	B, C	A	
plans into action	OMW3 - national consultant facilitates workshop for relevant staff, OMS1 - study tour to other PA planning units*	A to C, E	F to W (x2 PA's)	F to W (x2 PA's)	F to W (x2 PA's)
managing organisational change	OMW4 - ext consultant facilitates dev wkshp for relevant staff	A to C		F to G	
developing effective procedures	OMW5 - national consultant facilitates dev wkshp for relevant staff	A to C, F			
financial strategy/plan/control	OMC1 - Financial TA presents course for relevant staff				A-C
managing people	OMC2, OMC3, OMC4 - 3 courses presented for relevant staff*	A to C (OMC2)	F (OMC2)	E (OMC2)	G to I (OMC2)
negotiating	OMC7				
project task management	OMC8				
presentation skills	OMC11				
managing effective meetings	OMC12				
instructional skills	OMC13		E to L (selected group)		M to T

Key CCW- Core competency workshop CCC- Core competency course OMC- Organisational management course OMW- Organisational management workshop OMS- Organisational management study tour	A- Director/ Coordinators B- Planning Team C- Training Committee D- Accountants/Assistants E- HQ Officers and Vet F- Warden in Charge G- Engineer H- Warden	I- Warden- Tourism J- Warden- Com Cons K- Research Officers L- Comm & Tourism Officers M- Asst Warden Comm Con N- Asst Warden O- Asst Warden RM P	P- AW Comm & Tourism PA- Protected Area Q- JW Sec & law enforce R- JW Comm Cons S- JW Comms-Tourism T- JW R/Monitoring U- Rangers sec and law enforce	TA- Technical Advisor V- Ranger Comm Cons W- Rangers driver guides X- Gate clerks Y- Senior Secretaries Z- Drivers A1 Admin Assistants
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REFLECTION QUESTIONS

Are current job descriptions available for all levels of work in your organisation?

What has been the basis for selecting training topics in the past?

How were training needs identified?

Do training needs indicate levels of knowledge, skills and attitudes?

Whose input do you need when you develop a training plan?

Does your training plan include training activities other than workshops?

How much time will your training take and is it realistic to expect that trainees can be released from their other duties?

Summary

Training plans are formulated on the basis of a thorough assessment of training needs. There are a variety of ways to identify training needs, and the Training Officer may select a combination of methods depending on which are the most practical, useful and participatory. Although the primary purpose of a needs assessment is to determine which cadre of employees require training in what area, the needs assessment may serve as baseline data for training officers when they evaluate the impact of their training programme (see Chapter 8).

Needs assessment identifies the gap between ideal performance (as outlined in the job description) and actual performance. Although performance may differ from one individual to another, needs assessments generalise about the performance of a group of persons working at the same level. To measure performance, the Training Officer refers to the current job description and determines what knowledge, skills and attitudes are required to carry out each duty listed. This process enables the needs assessment to measure the same knowledge, skills and attitudes. With such information, the training plan will be able to address all three areas of behaviour, not simply the need to gain information. The training plan should not be limited to a list of training workshops ~ it should include other ways of learning as well, including short courses, study visits or even individual learning on the job.

Training plans provide general information on how an organisation addresses training needs. Once the plan is established, flexibility remains for the Training Officer to develop effective training designs within the framework of the plan. The next chapter goes into more detail about how training design can have a greater impact on behaviour change.

That was a lot of planning! We defined each employee's duties and updated their job descriptions. We analysed the performance required for each position. We learned about assessment tools and carried out a needs assessment to find performance gaps. We combined the needs, prioritized them and matched them with training. We added a schedule and now all we need is a budget to complete our training plan.



Section Two

DESIGNING TRAINING PLAN COMPONENTS

THIS SECTION INCLUDES

Chapter 3 Effective Approaches to Training

**Chapter 4 Fundraising for Training
&**

Chapter 5 Getting Organised

This section brings the Training Officer to activities linked to the implementation of training. To carry out what has been outlined in the training plan requires organising human, material and financial resources in greater detail. Even with a training plan, the training officer is left with many questions about how training will occur: What if the budget for training is insufficient? What can be incorporated into the design to make training most effective in improving job performance? What can the Training Officer expect from others? These are only a sample of the questions that have no clear answers. Chapter 3 encourages the training officer to use the concept of experience based learning in designing practical training events and transferring training skills to application in the workplace. Chapter 4 provides guidelines for developing more convincing proposals, targeted to donors most likely to provide funding for training interventions. In Chapter 5, a number of planning and organising issues are presented to prepare the Training Officer for implementing training in collaboration with trainers, supervisors and participants.

Chapter Three

Effective Approaches to Training

Within training plans, there are a variety of opportunities for training officers to develop creative training activities which will have maximum impact on job performance. Although the training plan outlines, in general terms, what kind of training will happen and when, flexibility remains for a variety of options to be addressed regarding the location of training, the nature and exact content of training activities, and the kind of follow-up support trainees might expect. It is at this level of planning that the Training Officer can link training with impact on performance by selecting innovative training approaches.

This chapter presents the concept of **experiential learning** as a guide for the design of practical training. The chapter also explores how training events can be improved through continued learning in the workplace.

The Experiential Learning Cycle

People learn from their experiences in everyday life. Through interaction with other people, we gain new information and learn how to face challenges, solve problems and conduct ourselves in a variety of situations. Through experience, we enhance our skills, and our abilities become stronger and better developed with additional practice and application.

The process of learning through training should be similar to the process of learning in everyday life. Training should be based on real experiences with interaction and practice. Training should provide opportunities for continued learning in the workplace. This concept of experience-based training is represented in a model called the *Experiential Learning Cycle*.

The Experiential Learning Cycle is a model showing how learners can do more than simply receive information through lectures. It encourages learners to think for themselves and learn through experience and interaction with others. Training officers who use this cycle know that it is not sufficient to simply provide information to trainees - they know that trainees who are challenged to discover things on their own, learn better and retain their knowledge longer.

The learning cycle is a process with four phases:

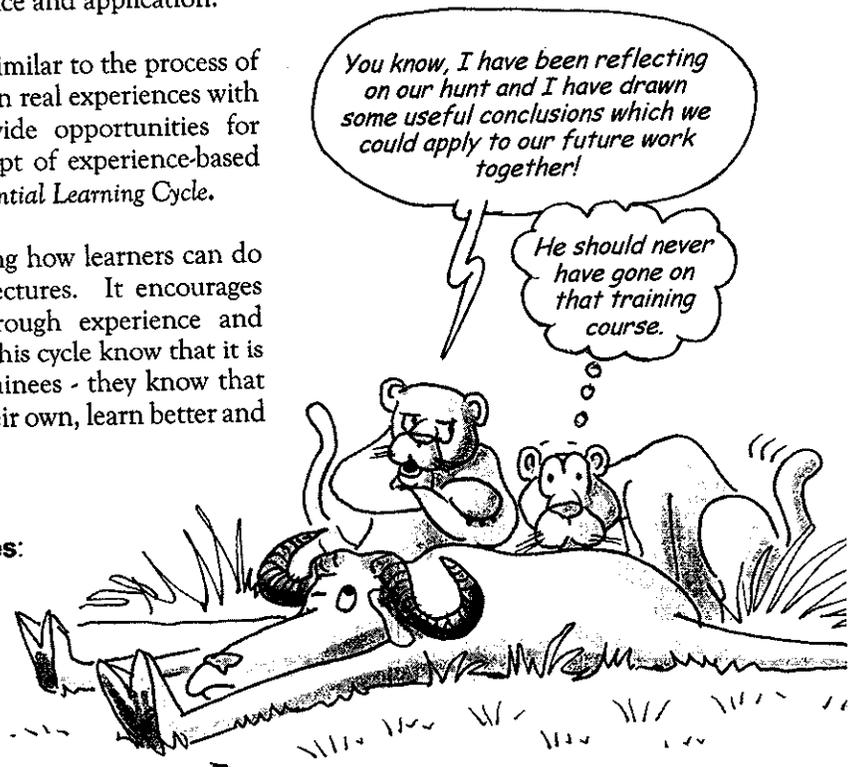
- ① Experience
- ② Reflection
- ③ Drawing conclusions
- ④ Applying lessons learned

OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO

Design experience-based approaches to make training more effective.

Integrate action planning into workshop design and ensure appropriate transfer of learning to the work setting.



The most effective learning is based on real experience.



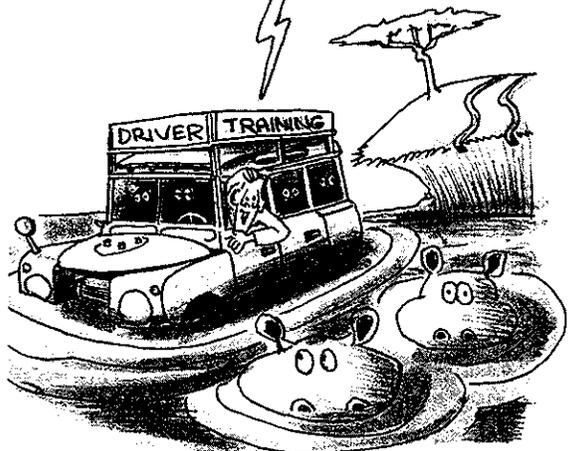
Using The Experiential Learning Cycle

This is the Experiential Learning Cycle. By using the four steps in the cycle, you can learn to make training more effective

Experience

Experience can take many forms including role playing, field visits, exercises, demonstrations and case studies. It gives the trainee the opportunity to participate fully in learning.

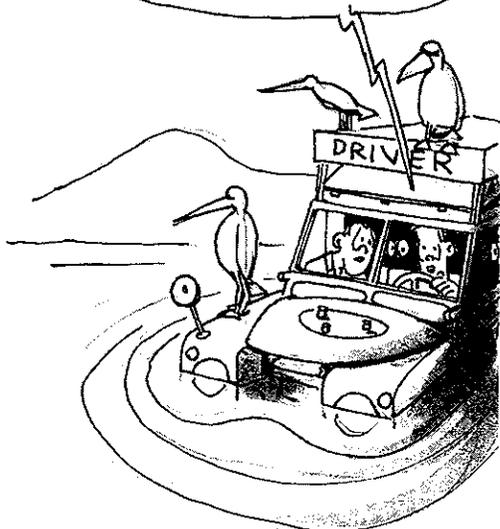
Now that was an experience!!



Reflection

Reflection involves thinking about the experience and making sense of it all.

After reflecting on it, I think I made a mistake! What do you guys think?



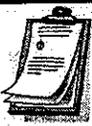
The Experiential Learning Cycle



The learning cycle begins with experience. After we experience something we tend to reflect on it. Following a period of reflection, we draw conclusions about the experience. Lastly, we apply the lessons learned. Experience, reflection and the conclusions we draw make us better prepared for similar situations in the future.

Phase 1- Experience. The concept of experience-based learning suggests that training should be designed to place participants in practical, real life situations rather than a classroom setting. This type of training challenges trainees to relate the subject matter to their own experiences and work. The experience phase provides an opportunity for learners to test knowledge and skills in practical situations. It can take many forms including field visits, demonstrations, role playing, exercises and case studies. Use of practical experience in training enables participants to share ideas with other trainees and with trainers.

Phase 2- Reflection. In life, when we encounter a new or unusual experience, the first thing we do is talk about it with somebody else. If nobody else is around, we spend time thinking about what happened and we try to make some sense of it all. Phase 2 of the cycle requires that trainees contemplate the experience. This can be promoted in a training situation through reflection and discussion. By sharing experiences, trainees learn from each other.



Phase 3- Drawing Conclusions. Phase 3 of the cycle requires learners to draw conclusions about the experience and what knowledge and skills they have gained. The conclusions are based on reflection and discussion. This is the phase where lessons are truly learned-where participants decide what it all means to them. Trainees should take this opportunity to draw useful conclusions and identify principles which they will find useful in their work.

Phase 4- Applying Lessons Learned. For learning to be truly effective, a link must be made between the training experience and the workplace. Phase 4 strengthens this link by providing opportunity for practice and application of lessons after training is completed.

The learning cycle may appear to be too theoretical at first but the basic principle should be remembered:

Design training which puts participants into situations where they need to work things out for themselves. If learning comes from within the participant rather than from the trainer, the lesson will be more effective.

Action Planning

The Experiential Learning Cycle suggests that participants need to apply their new knowledge and skills on a continual basis in order to reinforce learning and raise their performance. Trainees do not only learn during the scheduled training activities, they continue to learn as they develop their new skills on the job. Good training design includes follow-up. Action plans provide follow-up opportunities for continued learning.

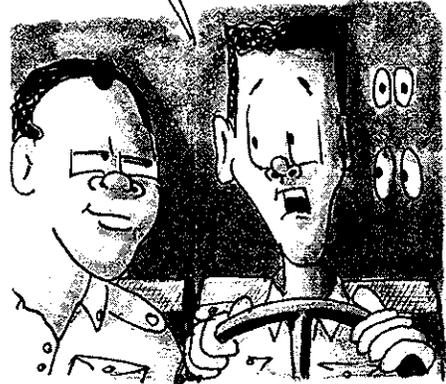
Action plans are documents prepared by training participants which indicate how they will apply the most important aspects of a training activity in order to continue learning and to link the training with work impact. Action plans enable participants and supervisors to monitor performance improvement following training activities. Good action plans may be prepared during workshops and require discussion with supervisors prior to or during development. The plans also require support from supervisors during implementation.

See the examples of action plans and lessons learned on the following pages.

C o n c l u s i o n s

Trainees must be encouraged to draw practical conclusions from their experience and feedback from others.

From reflection and your feedback, I have concluded that mud can be very slippery and it would be wise to drive slower when the road is wet.



A p p l i c a t i o n

To make the cycle complete, trainees should be encouraged to relate the training to their workplace and continue learning.

I'm going to practice driving in the mud and I plan to waterproof my vehicles.



Learn more about the use of the learning cycle in Chapter 6.

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12 ACTION PLANNING- from Malawi

A workshop on Human Resource Management held in Malawi included an action planning component, which organisers referred to as a *learning application project*. The objectives of the action planning component were threefold:

- ❶ To assist participants to put what was learned into practice.
- ❷ To develop an action plan or recommendations aimed at resolving problems in the department or at the participants' station.
- ❸ To build communication skills and self-confidence.

The workshop participants included two protected area managers (PAMs) who were regional officers, two PAMs from headquarters, one human resource management officer from headquarters, and 17 PAMs posted around the country. During the action planning activities, they organised themselves to work together in small groups or to plan individually. The participants chose the topic of their action plans from the topics covered during the course.

The trainer provided general guidelines for participants to follow, and the action plan format included:

- an introduction,
- a description of the issues related to the subject matter,
- conclusions and
- recommendations

Once each plan was completed, participants made presentations to the rest of the group. Trainers and participants provided feedback on each presentation, following established criteria including:

- relevancy to the course content
- applicability
- mannerisms observed
- composure
- voice level

Lessons learned from this action planning experiment include:

- ✓ action planning should be introduced from the start of workshops to help participants develop thorough plans
- ✓ exposure to presentation techniques added to the value of learning through action planning
- ✓ time was a constraint in developing effective action plans
- ✓ working groups and individuals need extra attention-- two trainers are not enough
- ✓ participants should play a more active role in providing feedback to other participants
- ✓ sufficient time needs to be allocated for participant presentations

ACTION PLANNING- *from Tanzania*

In Tanzania, training organisers experimented with the action planning process and reflected on what they learned about action planning. They determined that:

- ✓ as participants proceed through sessions, they should, at the end of each session, spend time thinking about how they could plan to apply what they have learned. This could then be revisited during the action planning stage incorporated into the plan. It reflects the facilitator's ability to structure learning around the Experiential Learning Cycle
- ✓ the concept of action planning should be introduced at the beginning of the workshop
- ✓ action planning needs to be given sufficient time during the workshop
- ✓ participants should do critical analyses of each others' action plans
- ✓ action planning should be realistic, not overly ambitious, to increase chances of implementation
- ✓ action planning leads to follow-up activities and should be linked to supervision activities

Implications for Training Design

The Experiential Learning Cycle, and the concept that training initiates a process of continued learning should have great influence on the design of your training activities. Keep the principles in mind when you consider how best to create effective learning experiences for your trainees.

Use the principles to help you decide if training should take place in town or in the field, if training should include field visits and how much time should be included for discussion with other participants. You may also consider which trainers are available and if they will readily adopt your progressive approaches to training. These decisions will help you to design practical, experience-based training.

Other concepts presented in this handbook are important to consider as well, including the Principles of Adult Learning and the concept that training should lead to attaining specific behavioural objectives. This material is covered in detail in Chapter 6.

Two examples of creative approaches to training design follow. The first provides ideas on how to address training needs when there are no trainers skilled in progressive approaches available. The second example presents a two-part training design which effectively breaks away from the traditional approach to training and focuses on the needs of the trainees.



Use the Experiential Learning Cycle when designing your training activities.

E DEVELOPING IN-HOUSE TRAINING SKILLS- *Congo*

The 'two-step approach' offers an example of how to develop in-house training skills and make the most out of sending individuals for training in another country. Rather than perceiving a regional training opportunity simply as a means of developing the skills of a few individuals, a two-step approach was used to transfer those skills to the national and local level through additional training.

Three protected area managers with no experience in training but with community development responsibilities were sent on a one-month study visit outside of Congo. The study visit was a regional activity which included a training workshop, site visits, and action planning. As an action plan, the participants prepared a training workshop to be carried out upon their return home. Each of the three managers focused on a different theme within community-based conservation: 1) relationships between villagers and park managers, 2) conservation education, and, 3) anti-poaching activities. They knew that there were no trainers available in their own country with up-to-date training skills in these areas.

When the team of three returned home, they invited their host from the study visit to assist them as lead trainer in preparing and carrying out a one-week training workshop (in-country). Prior to the workshop itself, the lead trainer guided the team in designing the content and methodology the national-level trainers would follow.

Another example of the two-step approach also comes from Congo. This case involves training on the use of improved domestic hearths. A national workshop was staged to bring together protected area managers and community representatives for basic training. From there, the participants planned to carry out demonstrations of domestic hearth construction in their local villages. To reinforce follow-up training through construction activities at the local level, training staff then visited the sites to provide technical assistance.

Both of these examples demonstrate how to maximise the impact of one original training workshop by helping participants to plan and carry out similar training activities at their own levels. This multiplies the number of people who benefit from the training and it provides an opportunity for application as a follow-up activity. Equally important, when participants return from training events with new skills, they can demonstrate those skills to others in their own locality or region. As a result, their sense of responsibility and self-esteem grows significantly and their authority as trainers increases.

E BUILDING ON PREVIOUS TRAINING- *Uganda*

In Uganda a two-part management training course was offered consisting of a pair of two-week training workshops for a group of protected area managers. The time provided between the two workshops gave participants a chance to practice and test their new skills in the workplace. During the first workshop, participants learned new concepts and skills and discussed how they might be implemented in their work. Before they returned to the second follow-up workshop each of the participants completed a questionnaire that provided specific information on their ability to apply what they learned. It listed the behavioural objectives of the first workshop and asked them to rate the extent to which they felt they were attaining those objectives in the context of their workplaces. The results of the questionnaire determined what areas needed further knowledge and skills development, and the training organisers were in a better position to identify the most appropriate training techniques during the second workshop. As a result, the Training Officer and the trainer were able to revise the second workshop in a way that built upon the participants' experiences during the interim period.

Summary

Training activities can lead to improved performance on the job through learned behaviour change. The most effective training focuses on practical learning experiences and reinforcement of learning through repeated application. The Experiential Learning Cycle is a conceptual model which suggests how we learn from our experiences. It is a cyclical model because, through active experimentation over time, we can internalise new knowledge, skills and attitudes required in a given situation. It reinforces the notion that 'if at first you don't succeed, try, try again!'

This theory has important implications for the Training Officer in the design of training activities. If training occurs over a five day period, for example, we cannot assume that learning is complete. The Training Officer should consider how to promote continued learning following the training event. Continued learning can occur through close supervision, additional follow-up training and/or action plans developed during the training event for continued learning on the job.

Training officers should be creative in designing practical training events which require participants to learn through experimentation, application of skills and discussion with others. Opportunities should be provided for trainees to apply and test new skills in the workplace after the formal training is completed.

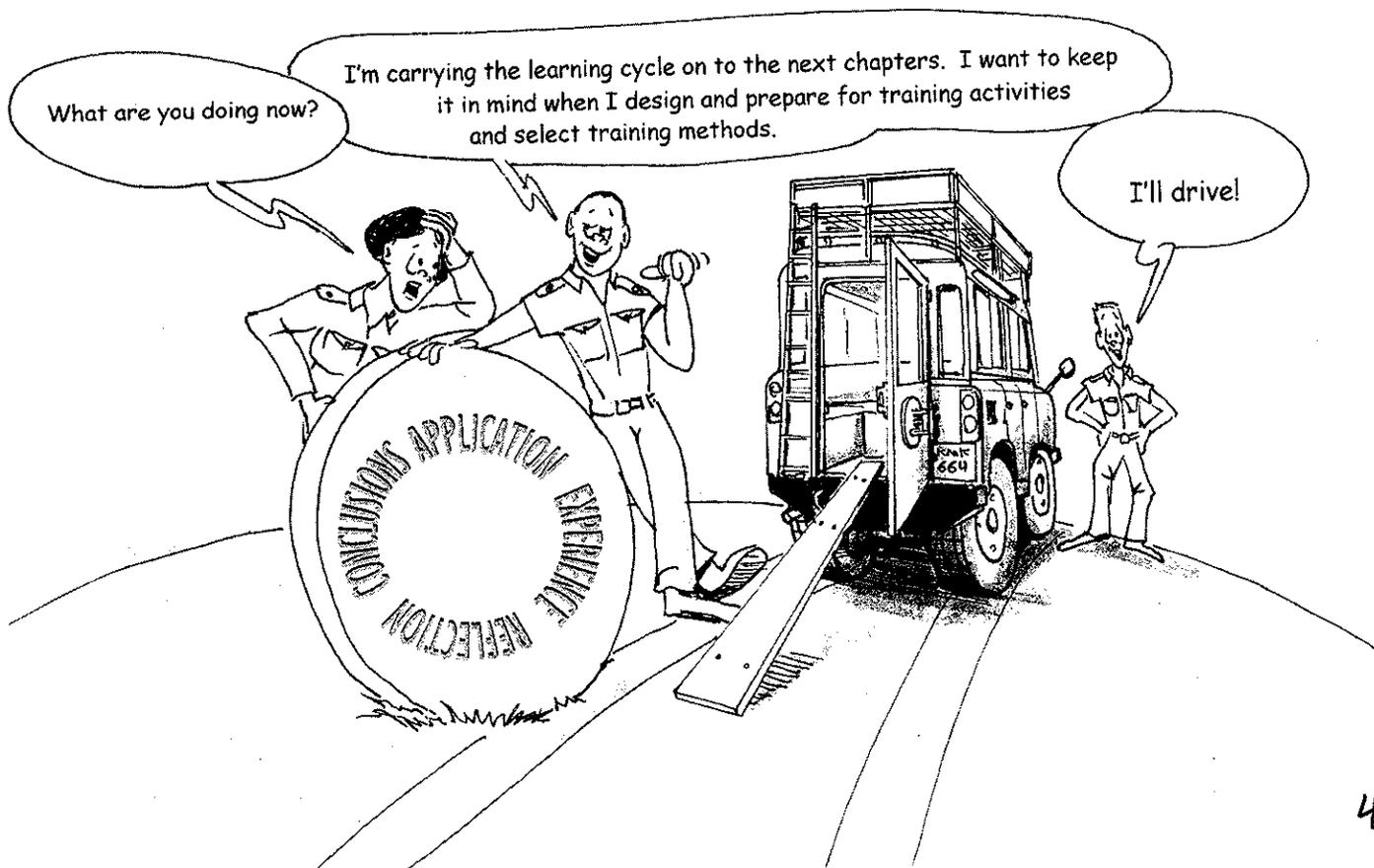
The information from this chapter should help you to design effective training approaches. The next chapter provides practical information on how to gain financial support for training.

REFLECTION QUESTIONS

How do the organisation's training activities help participants reflect on what they experience in the workplace?

Is training designed to include follow-up support to participants after the training event ends?

What is the role of supervisors and other managers in the training process?



Chapter Four

Fundraising for Training

The previous chapter was designed to provide training officers with the basic principles required to develop effective and long lasting training activities for improved performance in the workplace. This chapter will focus on support for training through funding. Most training activities, no matter how well designed, require some form of financial backing, either from within the organisation or from donors. The extent to which this chapter will be useful to you depends on the nature of your organisation and whether your responsibilities include fundraising.

This chapter is designed to assist training officers and others with fundraising responsibilities. It begins with an emphasis on learning about donors as the initial step in the fundraising process, followed by information on proposal writing, with a particular emphasis on budget preparation.

The Funding Cycle

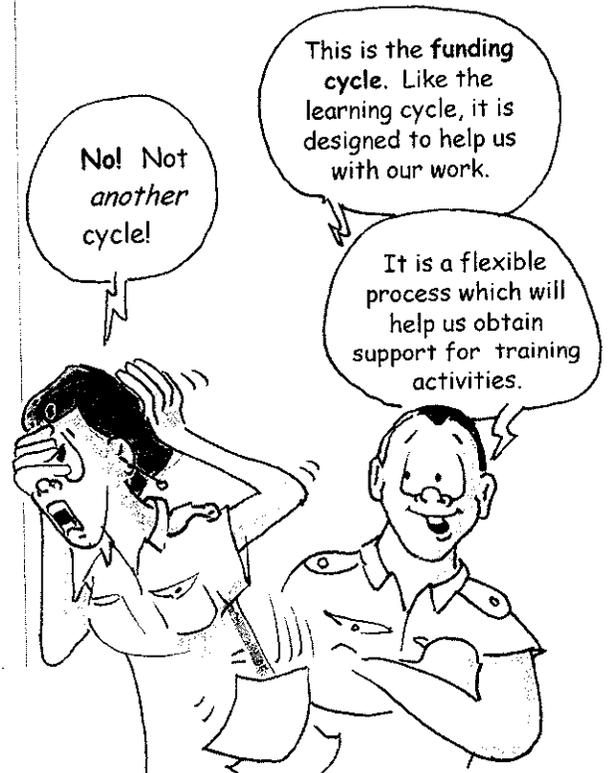
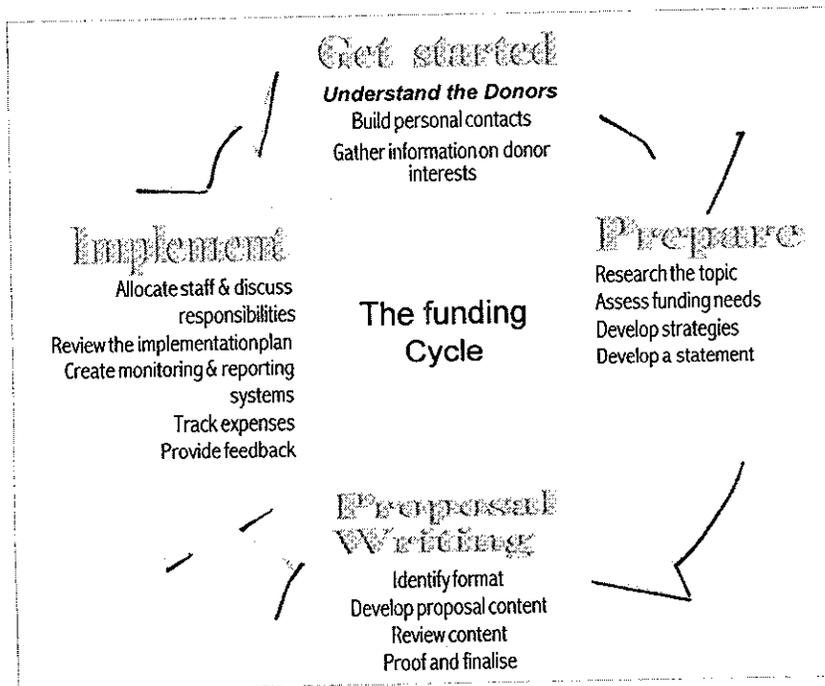
Securing funds for training activities can be thought of as a circular process of related steps. Keep in mind that the steps may not always occur in the order presented below. Be flexible with your approach, modify the steps for your unique situation and don't be discouraged if steps have to be repeated.

OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO

Follow a cyclical process of fundraising with donor agencies.

Submit a training project proposal that includes a description of the training needs, the training design and the financial resources required.



Getting Started

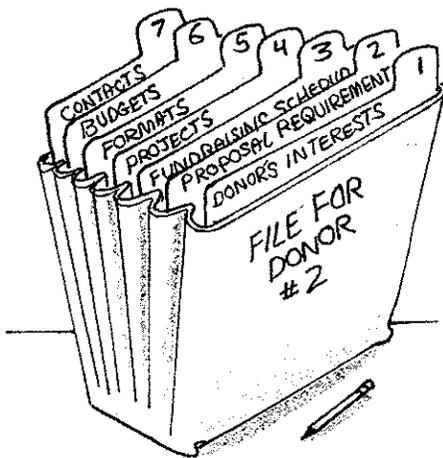
Each donor is different and some will be more interested in your activities than others. It is necessary to research the interests of each donor before approaching them formally.

The steps involved in the cycle are relevant for securing both internal and external funding. Keep this in mind as you read the chapter.



Fundraisers should not be expected to perform miracles - like training officers, they need support from across the organisation.

Money makes money: The organisation needs to commit to fundraising by allocating funds for staff to develop proposals and market training programmes.



Your organisation should consider collecting and maintaining the information relating to donor agencies (including articles, annual reports, requests for proposals). Make donor profiles.

Understand the Donors. There are several different types of donors, each with their own interests, goals and methods of operation. Your first step should be to identify what types of donors are most likely to fund your work. Fundraising activities usually focus on the following types of donors:

- Bilateral donors (single government organisations such as Embassies, United States Agency for International Development, the German Technical Agency for International Development (GTZ), French Cooperation or the European Union).
- Multilateral donors (multiple government organisations, such as United Nations Environmental Programme, United Nations Development Programme, Food and Agriculture Organisation).
- Corporations and businesses (international, national and local).
- Individuals (members, philanthropists, community leaders, etc.).
- NGOs and Foundations (organisations which support projects with funds from grants or their own income).

It is wise to focus your fundraising efforts on donors which have interests and goals similar to your own. Avoid applying to donors who are unlikely to have an interest in your project as such approaches can be time consuming and you may be forced to compromise your objectives.

Be Prepared

Good information should be an essential part of your fundraising approach. Research carefully before writing your proposal. Send a letter of inquiry describing the concept of the project to the donor. If necessary, get support from senior management to reach priority donors. Visit donor representatives or invite them to visit you and observe ongoing activities and projects.

You should also consider that donors will be curious about your organisation and its structure. They will need a good picture of your organisation before they can consider funding your project. They will be interested in your operations and they will need to know how funding is managed within your organisation. In particular, they will ask:

- ❶ Is your organisation a government department or a parastatal?
- ❷ Can a donor organisation provide funds directly to a particular project within the organisation?
- ❸ What method of financial tracking does the organisation use? Do mechanisms exist to ensure that funding supports intended projects?

It may be wise to prepare a clear statement which presents a case for your organisation's credibility (i.e. Why is your organisation important and effective in the area in which it works? What is the broad context in which the organisation plays a role? What difference does the organisation make and to whom?).

Use a personal touch in your fundraising efforts. Personal contacts, especially at higher levels, may be effective in facilitating, networking and marketing your activities to sponsoring agencies. Make a list of your own personal contacts within donor agencies and ask your contacts to help you expand your network.

Proposal Development.

You can never over-plan: your proposal should contain clearly stated goals, measurable objectives and complete details regarding project activities. A good deal of time is required to plan your approach and gain approval within the organisation before your proposal can be submitted. Fundraising should not be rushed. Make sure you start the proposal process early enough to allow ample time for preparation and to allow the donor enough time to review your project.

Project Proposal Components. Project proposal formats vary from one organisation to another. Keep up to date with proposal formats and fundraising procedures used by donors and your organisation. Most well prepared proposals contain the following components:

Cover Letter. The cover letter acts as a brief introduction to the project and your organisation. It should be in the form of personal correspondence between a senior representative of your organisation and the donor. The cover letter should be no longer than one page.

Title Page. The title page presents the project title, budget amount, organisation's name, donor's name, addresses, contact information and the date submitted.

Executive Summary. The executive summary is an overview of the project design, including a description of your organisation, the project concept, the goal(s), and the amount of funds requested.

Justification (statement of the problem/need). The justification is a well researched description of the current situation which the project intends to address. It should demonstrate a clear need for the project and indicate the consequences if the project does not occur. Provide adequate justification for the project - convince the donor of the project's relevance. Do not assume that the donor understands the issue thoroughly - you are the ones with the expertise.

Goals and Objectives. The goals and objectives indicate the intended results of the project stated in clear, realistic and measurable terms.

Activities and Implementation Plan. The activities and implementation plan provide a detailed description of the project's strategy, including when activities will be carried out and by whom.

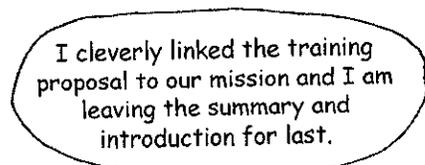
Monitoring and Evaluation System. The proposal should include a plan for collecting information on the progress of the project, indicating who will collect information and how they will collect it.

There is no magic formula to proposal writing—it takes patience and practice!



Familiarise yourself with the donors' guidelines and specific interests so that you can tailor your proposal to their requirements.

Present your organisation's mission so that the donor can see that the project is grounded in the mission.



Present your organisation as having a unique capability to implement the project. Show that you have a particular opportunity to make a strong impact.

Budgeting is often an overlooked part of proposal writing and project design although it is one of the most important. Be sure to commit ample time and energy to producing complete and practical budgets. Be sure to show how training will continue to be supported once the funding ends. Indicate how your organisation and others will contribute to keep training active.

Sustainability Considerations. The proposal should include a description of how your organisation will be able to continue with project activities and provide services once the requested funding comes to an end. If possible, indicate other sources of support you may have.

Organisational Background. The proposal should include a description of your organisation's history and its current activities. Include biographical information on key project personnel and a description of the organisation's management structure to demonstrate how the project intends to manage finances. Remember to include information on the mission of the organisation and how it relates to the proposed project.

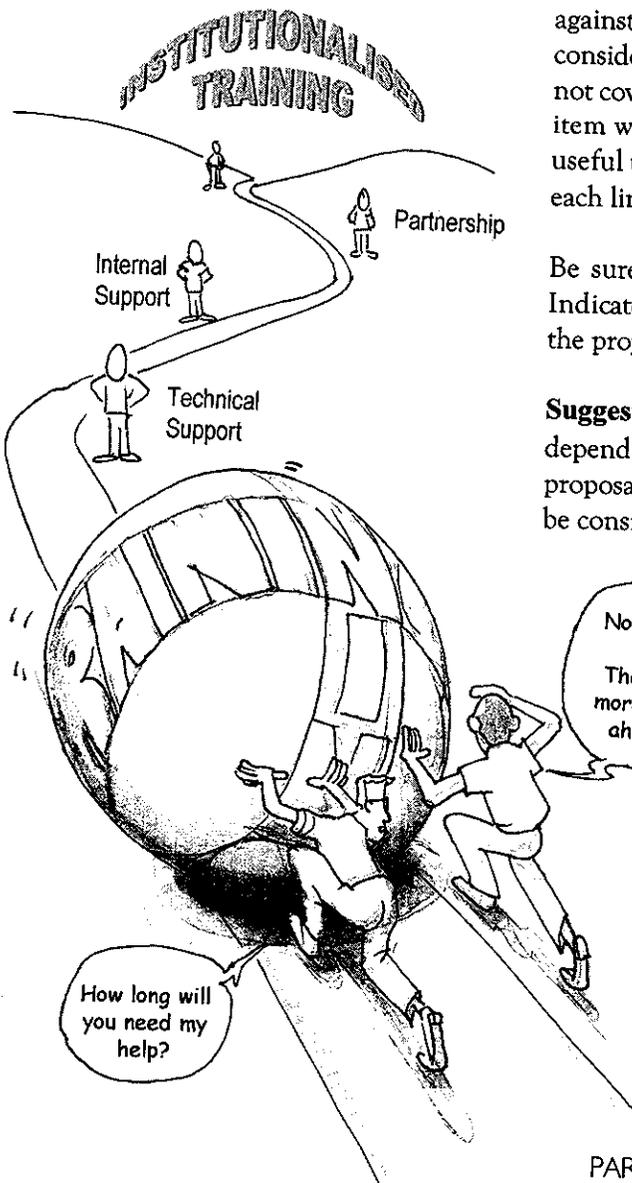
Budget. The proposal should include a detailed plan for project expenditures.

Developing Budgets

Good project proposals require sound and detailed budgets. Keep in mind that the budget will be heavily scrutinised by the donor and compared against the project objectives. When drafting budgets, it is important to consider what donors will and will not fund. For example, many donors will not cover salary costs for government employees. In such cases that budget item would need to be indicated as the organisation's contribution. It is useful to include 'budget notes' along with the budget, in order to explain each line item and how it has been calculated.

Be sure to show how the activity will be funded after the project ends. Indicate what your organisation (or other organisations) will contribute to the project and show this as a separate column in the budget.

Suggested Budget Categories- Although your budget format may differ depending on procedures within your organisation, the nature of your proposal and donor requirements, the following budget categories should be considered:



- ✓ Personnel
- ✓ Fringe benefits
- ✓ Consultants
- ✓ Travel
- ✓ Per Diem
- ✓ Direct Costs

❶ **Personnel (Salaries and Wages).** Personnel includes anyone on your organisation's payroll who will work on the project. In many organisations, staff time must be accounted for and charged to specific projects. Project budgets should account for the estimated time to be spent by each individual involved and costs based on their salaries. The daily rate for staff members may be determined by their annual salary divided by the number of regularly paid working days in the year.

❷ **Fringe Benefits.** This item covers the costs of employee benefits such as health insurance, sick leave, vacation and holiday leave. Each organisation has its own set of benefits and its own method of calculating the cost of benefits. In any case, they are organisational expenses and should be included in the budget.

❸ **Consultants.** Consultants include professionals who will be working on the project but are not on your organisation's payroll. They work for the organisation under a contract for a specific task. Costs for their services should be based on a daily rate and an estimate of the number of days which will be required of them. Daily rates may be based on the salary history of each consultant and they should be negotiated at the time the contract is drawn.

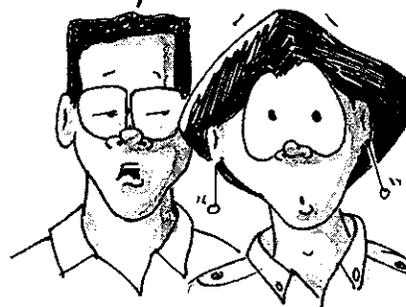
❹ **Travel.** Travel covers all transport expenses relating to the training event. Remember to include all travel necessary before, during and after the training. Consider the costs of getting your participants to the venue as well as costs for transporting participants to and from field activities. Budgets for taxis, buses, vehicle rentals, use of the organisation's vehicle(s), or any other anticipated requirements for transportation should be based on estimates of kilometres traveled and relative costs at the time of the training event.

❺ **Per Diem.** Although *per diem* means different things to different people, it is a Latin phrase meaning 'by day.' As a budget item, *per diem* should reflect the daily cost of providing hotel, meals and incidental expenses (such as laundry and phone calls) for each individual. Most organisations have a policy for determining *per diem* rates, and you should always follow that policy to avoid confusion about how much money a participant or staff member might receive. Often, the organisation uses some or most of the *per diem* line item to pay hotels and restaurants directly, based on actual costs rather than giving the money to participants.

❻ **Direct Costs.** This line item includes direct costs not already covered elsewhere in the budget. Direct costs often reflect payments to individuals or organisations for services or products, which are not contracted for separately. The following might be included in this line item:

- training room rental
- training supplies
- equipment
- photocopying
- telephone/fax
- postage

I'd love to facilitate next week's training event but you never budgeted for my time. Sorry!



Be careful not to underestimate personnel costs and time, and keep in mind that many donors have upper limits for consultancy fees.

As an alternative to requesting funding for certain line items, the organisation should consider other creative options. This might include special arrangements with hotels for lodging, free speakers, collaborative relationships with businesses or other exchanges of goods and services.

Did you get the funds for the pilot training?

Not exactly. I got something much better!



Sample Budget

Management Training Workshop

All costs in US Dollars

BUDGET CATEGORY		UNIT COSTS	NUMBER OF UNITS	AMOUNT REQUESTED	INTERNAL CONTRIBUTION
I	Personnel				
	Training officer	50/day	5 days	0	250
	Trainer	40/day	15 days	0	600
	Administrative Assistant	5/day	10 days	0	50
	Driver	5/day	10 days	0	50
	Sub-Total				950
11	FRINGE BENEFITS (15% OF SUB-TOTAL)				143
III	CONSULTANTS Management Specialists	100 per day	10	1,000	
IV	TRAVEL				
	International airfare	1,500/ticket	1	1,500	
	In-country airfare	200/ticket	4	800	
	Ground transport	75/ticket	6	450	
Sub-Total			2,750		
V	PER DIEM				
	Hotel 25 people/ 10 nights	30/night	250	7,500	
	Group lunches	7/person	250	1,750	
	Morning tea and coffee	2/person	250	500	
	Allowance: dinner and incidentals	10	250	2,500	
Sub-total			12,250		
VI	OTHER DIRECT COSTS				
	Training room rental				500
	Training supplies				
	Equipment			500	
	Transport for field segments			150	
	Photocopying			200	
	Telephone/fax			50	
	Postage			200	
	Sub Total			50	
			1,150		
Total Budget				17,150	1,593



If the proposed project is intended to extend more than one year, the budget should be broken down into columns for each year, with the last column showing the combined totals for all expenses.

Think about unconventional options for project support and take a long-term approach

Conventional donors may not be the only potential source of support for your training activities. Training institutions, universities and international NGOs represent alternative sources of project support and partnership. Many of these organisations receive donor funds in order to support training activities. These prospective partners may consider proposals from national organisations such as your own or they may offer direct funding for short-term courses overseas. In some instances, they have funds available to conduct in-service training courses. Support may also be offered in the form of technical expertise. Partnerships with organisations such as these may result in supplemental support for training activities over the long- or short-term.



Your relationship with donors does not cease to be important once your project is funded. Your relationship with the donor requires continued attention once the funding has been received and the project is underway. By providing funds, donors demonstrate that they are interested in your work and your objectives. Work closely with the donor to report on progress, identify lessons learned and solve problems which arise. Good relationships with donors and good reporting may result in beneficial long term partnerships and additional funding.

Project Support Checklist

Planning

- Did you assess needs for funding and develop several alternative strategies?
- Did you research donors and other sources of support?
- Have you built strong contacts with potential supporters?

Linking up

- Have you discussed your ideas with donors and your supervisors?
- Did you develop and submit a concept paper?

Proposal writing

- Did you identify a good format and develop the proposal content?
- Was the content reviewed, proofed and finalised?

Implementation

- Have you allocated staff and discussed responsibilities?
- Was the implementation plan reviewed?
- Have monitoring and reporting systems been developed?
- Is there a system to track expenses?

Try developing a checklist like this to help you organise your approach and track progress.



REFLECTION QUESTIONS

What are the organisation's current sources of funding?

Where can you go to learn about other potential funding sources?

How do the organisation's past proposals compare to the kind of proposal recommended in this chapter?

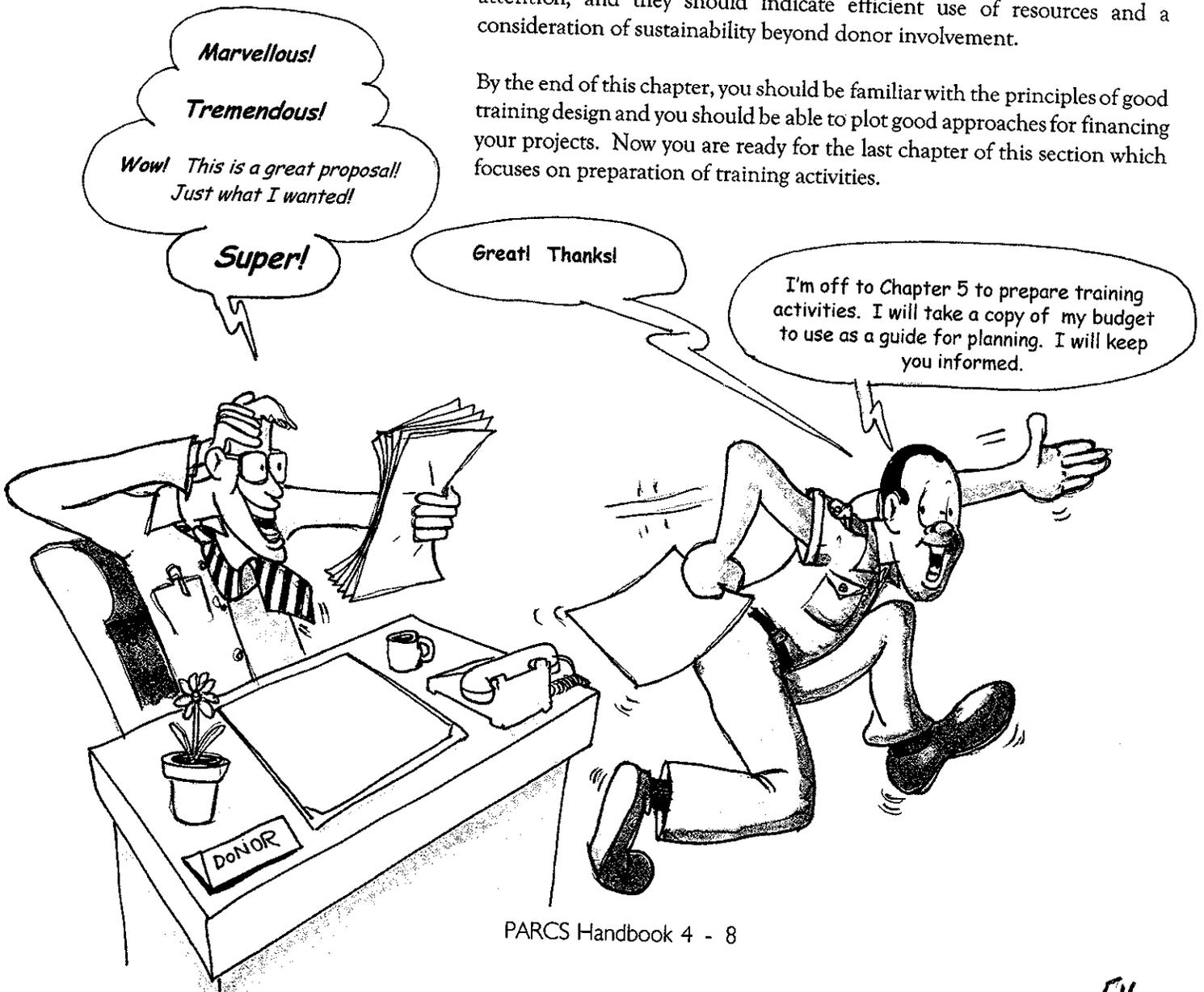
Who in the organisation can provide you with assistance in preparing a budget?

Summary

In times of scarce resources, training officers must be strategic in seeking funds for their training activities. It is not enough to send simple proposals to donors assuming that they will be sympathetic to your needs and good intentions. Strong, long-term partnerships with donors should be your goal. Be prepared with good documentation on how effective your training has been and can be in improving the performance of your organisation. Demonstrate how training results in better work in protected areas and with communities. Build on personal contacts and networking in your fundraising activities.

A well planned proposal is a sign to the donor agency that your organisation is serious about its work. The quality of the proposal is an indication of the quality of the project - the best proposals are more likely to have the greatest impact. Every donor has requirements regarding the format of a proposal, but there are basic components that every proposal should include. Stress solid justifications and clear goals and objectives. Budgets require particular attention, and they should indicate efficient use of resources and a consideration of sustainability beyond donor involvement.

By the end of this chapter, you should be familiar with the principles of good training design and you should be able to plot good approaches for financing your projects. Now you are ready for the last chapter of this section which focuses on preparation of training activities.



Chapter Five

Getting Organised

Once financial resources are secured and available to support your project, it is time to focus on the organisation and preparation of training activities. This chapter is primarily for training officers and presents a number of planning questions which need to be addressed when preparing for training events. At this point planning relates to the more administrative and logistical issues that make training activities run smoothly, but it also influences the design of the training. The chapter includes a broad view of planning issues, advice on selecting trainers, guidance on how to specify topics and information on recruiting participants.

Even the best designed training will falter if mistakes are made in organising training activities. The importance of good planning and organisation cannot be denied, but it is often difficult to know where to begin when planning training activities. One effective method for organising training is to use the budget as a guide. If your budget is well prepared, it effectively catalogues travel arrangements, involvement of key personnel and most of the resources you will require. Use the line items from your budget to formulate a checklist of questions (or action points) for workshop preparation and address the list while organising your training activity. The objective of the exercise should be to ensure that all relevant training issues are considered and addressed. See the examples below.

Sample Checklist: create a list of action points from the following:

Action Points Regarding Personnel

- How much of my time has been budgeted to work on this activity?
- Who else has been budgeted to work on this activity?
- Has everybody's time been planned?
- What are the responsibilities (in planning, implementing, and follow-up) of each staff member?
- Have we discussed our responsibilities as a group?

Action Points Regarding Consultants

- Has the best possible training consultant been identified?
- Has the consultant met with me to discuss his or her role during the design, implementation, and follow-up?
- Have the terms of reference and contract letter been completed and signed?
- What orientation does the consultant need?
- What support will the consultant need from my staff?
- What resources will the consultant need from me?
- Is there a plan for working with the consultant prior to the workshop?
- How will I monitor the consultant's work?

OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO

Select topics and develop overall training objectives.

Identify and contract the most appropriate trainers.

Communicate effectively with trainers in preparation for training events.

Prepare participants for training events.





Make sure that the travel arrangements for all those attending your training event are correct and confirmed.



It may be wise to visit the venue you intend to use beforehand to make sure that it is appropriate for your training event.

Travel

- Will any participants be arriving by air?
- Does the person ordering the plane tickets have all the information he or she needs?
- What airline schedule best corresponds to our needs?
- Who will pick up those arriving at the airport?
- Which participants will be arriving by road or rail and have their arrangements been made?
- When will they arrive?
- Do we need to order any tickets?

Per Diem

Hotel

- Which hotels can we afford?
- Which hotels have the facilities and services we need?
- How many trainers and participants will be staying in a hotel?
- Is the hotel clear about our needs? (rooms, tea breaks, meals, training room).
- Have we negotiated as well as possible?
- Have enough rooms been reserved?
- Do participants have all the contact information for the hotel where they will be staying?
- Will we pay the hotel directly or provide participants with lodging costs?

Meals and Tea Breaks

- Who is responsible for ordering meals and tea breaks?
- Where will the participants eat and drink during meals/tea breaks?
- What time will the tea breaks occur?
- How many people will eat as a group?
- Will meals be taken on site or elsewhere?

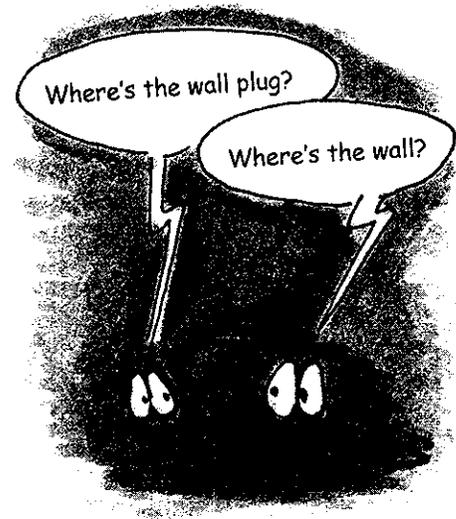
Allowances

- Will participants be taking any meals outside of the hotel?
- Do we need to provide money for meals outside of the hotel? How much?
- Does the organisation provide guidelines for allowances?
- What are the expectations of the participants regarding allowances?

Direct Costs

Training room rental

- Will the hotel provide a training room for free if we have participants staying at the hotel?
- Is the room well lit? Are there windows? Can the room be darkened for presentations if need be?
- Does the room have fans or air conditioners?
- Can we tape flip-charts on the walls?
- Can the tables be rearranged for small group discussions?
- Do we need extra rooms for small group discussions?



Make sure that your equipment is functional and check the access to light and electrical points.

Participants will learn better when they are well prepared and comfortable. Select a good working environment and make sure that the participants get all the material they need well in advance of the workshop.

Training supplies

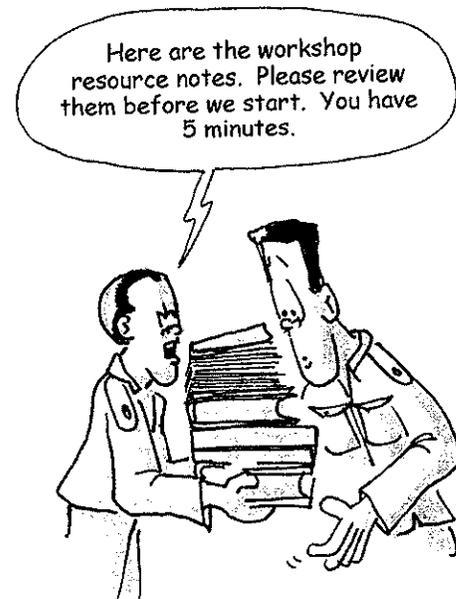
- What supplies need to be ordered?
- Does the person ordering supplies have all the information he or she needs?
- Where is the best place to order supplies from?
- What needs to be printed in advance (name tags, agendas, handouts)?

Equipment

- What equipment will we need (flip-chart stands, overhead projector, television/VCR)?
- Does the hotel have equipment?
- Can we borrow the equipment from elsewhere?
- Is there a regular electrical supply?

Photocopying

- How much photocopying will we need to do before the workshop?
- Will the trainer submit material for copying? By when?
- How much photocopying will we need to do during the workshop?
- Where is the least expensive place to do large copying jobs?
- Where is the most practical place to do small copying jobs?
- Who is responsible for organising photocopies?



Telephone/fax

- Do we have everyone's telephone and fax numbers?
- Will we be able to use a telephone at the hotel? A fax machine?

Postage

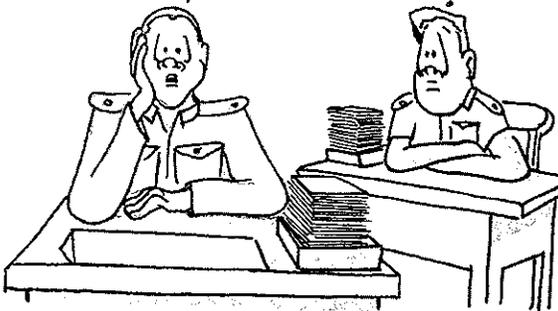
- What information will we need to send by mail?
- How will we invite participants?

Now we have a good list of items to address to prepare for the workshop. Let's assign responsibilities for each item to make sure each of them gets done.



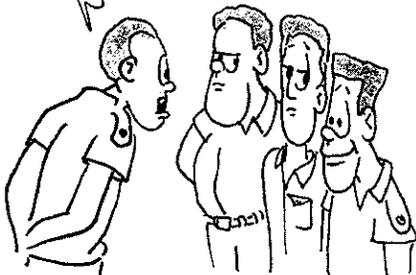
I wish I could find a trainer.

I wish I could conduct some training.



The ideal trainer may be found in-house.

Okay, which one of you wants to be the in-house trainer on elephant darting?



Once you complete the exercise, you should have a fairly good list of the tasks which must be completed to prepare for training. Thinking about them well in advance will help you avoid potentially difficult situations which would detract from the training. Go through your list and identify tasks which are of the highest priority and those that need to be done in sequential order. Plan to address those issues first. Consult the lists regularly to keep your preparations on track!

Contracting Trainers

The success of training depends to a great extent on the quality of the trainers involved. It is important to select trainers who have ample education and experience in the subject matter of your training. Your topics will be adequately covered and your training will be made more effective if you choose a trainer who has expertise in the subject area and credibility in the eyes of the participants.

Education and experience in the subject matter is not the only criteria for selecting trainers. Strong communication skills are also very important. You should not always assume that an individual can teach others just because he or she has knowledge in the subject area. The quality of a trainer's skills depend on both the person's understanding of the topic and the person's training skills.

When training needs arise, the Training Officer must consider what approach would be most efficient and effective: using in-house staff as trainers or hiring an outside consultant. It should not be assumed that getting a trainer from outside your organisation will be the answer to all of your problems! Whether you recruit someone from within or from outside, you will find both advantages and disadvantages in the long- and the short-term. Many organisations lack the necessary resources to employ full-time, in-house trainers. When full-time trainers are not available from within the organisation, one option is to develop the training skills of managers and supervisors. The following section may help you in make the right choice between in-house and consultant trainers.

Considerations for working with in-house trainers:

- ✓ in-house training makes your organisation's training capacity more sustainable
- ✓ it increases involvement of the organisation's managers and other professionals
- ✓ it can increase motivation among professional staff
- ✓ it utilises trainers who understand the context and needs of participants and the organisation
- ✓ it may be less objective
- ✓ it might not be as effective in bringing new ideas
- ✓ in-house employees brought on as trainers may not have enough time to practice and develop their training skills

Considerations for working with consultant trainers:

- ✓ consultants may be able to offer highly specialised skills and knowledge
- ✓ using consultants on a per-need basis may be less expensive than having a full-time trainer on the payroll
- ✓ the Training Officer has the option of using a variety of different trainers for different workshops
- ✓ if the consultant trainers do not perform well, the organisation is not committed to working with them again
- ✓ consultants can focus on work that the Training Officer may not have time or skills to address.
- ✓ using consultant trainers does little to strengthen in-house capacity
- ✓ there is a risk with every new consultant
- ✓ trainees may find it more difficult to communicate with an outsider
- ✓ working with consultants often requires more preparation time
- ✓ consultants may be very expensive
- ✓ the consultant may not understand your organisation's needs as well as an in-house trainer

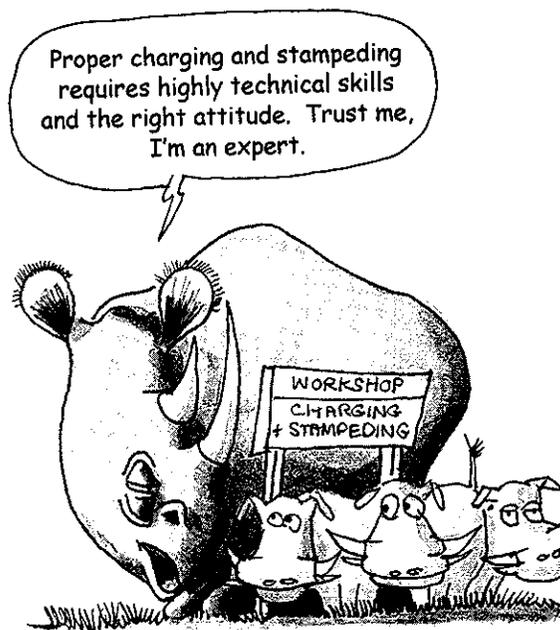
There is more to selecting the right trainer than simply collecting and reviewing résumés. Finding the right trainer requires careful planning and research. There are three basic steps to finding the right trainer:

❶ **Know what you want.** Don't try to make the job fit the trainer! Find the best trainer to fit the job. Consult your training plan and write down all of the things you would expect the ideal trainer to do. To make your list, consider the following questions:

- ❶ In what content areas should the trainer be experienced? What, if any, are the key areas where he or she needs to have an advanced level of knowledge?
- ❶ Should we use an in-house trainer or hire a consultant?
- ❶ What do others say about the proposed trainer's work?
- ❶ What kind of trainer will appeal most to the participants?
- ❶ What training methods do you want the trainer to use?
- ❶ Should the trainer be able to travel and stay away from home for more than a few days?
- ❶ Do you expect the trainer to stay late in the evenings and be available on weekends?
- ❶ Will the trainer need to develop his/her own materials and session designs?
- ❶ What is the most you can realistically afford to pay?

Use the list to judge whether prospective trainers measure up.

Using consultants enables you to use trainers who are specialists in your topic area.

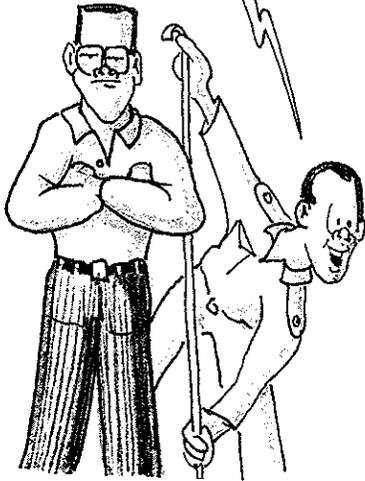


Know what you want before looking for a trainer.



Choose a trainer who fits the job. Do not fit the job to the trainer.

Here's a consultant who measures up. Put him on file!



It is important to observe prospective trainers in action before making your final selection.

Now, the most important issue in tourist relations is learning how to dance!

He looked so good on paper.



② **Search for a trainer who meets your criteria.** Matching a consultant to your needs is a challenging task. Contact other organisations which rely on consultants and ask for references for each of the consultants recommended. If an organisation doesn't have anyone to recommend, ask if they could direct you to someone who might have this information.

Develop a file of training consultants. Even if you don't need a trainer at present, you never know what needs you may have in the future. If the technology is available, you should consider creating a computer database of consultants. Consider listing the trainers by field of expertise.

③ **Make your final selection.** Once you have the names of a few trainers, identify two or three candidates that best fit your criteria. Before you make a final decision, you should: 1) conduct an interview; 2) observe the trainer in action; and 3) check the trainer's references.

Finding the right external consultant requires more preparation than using in-house expertise. Sufficient time is required to select consultants, clarify the tasks and agree on approaches. In some cases, it may be wise to request proposals from three or more consultants to obtain information on what services are available and at what cost.

Communicating with Trainers

It is essential that you have a good relationship with your trainer and it is very important that arrangements be formalised and clearly defined. Regardless of whether you select an in-house or a consultant trainer, it is important to clearly communicate the trainer's terms of reference and your expectations regarding the design, implementation and evaluation of the training event. Depending on whether the trainer is in-house or external, a memorandum, a letter or a full contract may be drafted stipulating the terms of reference and all relevant details involved regarding the work.

Internal memos may be used to contract the training services of in-house staff. Memos include:

- context of training assignment
- title of course
- target population
- duration
- proposed dates
- scope of work
- deliverables
- per diem policy

E **CONTRACTING A TRAINING CONSULTANT FOR A WORKSHOP ON COMMUNITY-BASED CONSERVATION-** *from the PARCS project staff, Malawi*

1) Request a proposal

A written request went out to potential training consultants, describing the project in general and the needs for a CBC workshop in particular. The request included the following information:

- project objectives
- project background information
- rationale for training
- list of major training topics
- proposed time period for the workshop
- request for the trainer's approach to training, proposed duration, and an indicative budget
- request for the trainer's curriculum vitae

2) Review of the proposal

The consultant who was chosen to do the training submitted a thorough proposal that included the following elements:

- introduction
- rationale for training
- training objectives
- training methodology
- priority training areas
- practical follow-up to the workshop
- course duration and programme outline
- indicative budget
- trainer's curriculum vitae

It is interesting to note that the components of a good proposal are quite similar to the elements of a final report. When the organiser receives a good proposal, he or she has some indication as to how thorough the final report might be. This proposal for training provided the organiser with sufficient information to make a decision to accept the best proposal and move to the next step, developing a contract.

3) Developing a contract

The contract that the organiser developed followed the format established by the contracting organisation. It was a standard contract, with space to fill in the name of the consultant, the contract dates, and signatures. The specific information for the assignment appeared in two attachments: the consultant's proposal and the statement of work.

The statement of work included the following information:

- overview/purpose of activities (this was taken directly from the first part of the request for a proposal)
- specific description of activities and responsibilities
- deliverables



Your organisation should have a clear policy for reimbursing consultants for lodging, meals, travel and incidentals.

Get a draft contract letter to the trainer as soon as possible. He or she may have ideas to improve the training event.



Contracting Consultants

Once the right consultant has been identified and duties have been discussed, a contract letter should be drafted to finalise the agreement with the consultant to provide training services to your organisation. Most organisations have a standard format for contract letters of this nature. The purpose of the contract is to ensure that you receive the required services and the consultant receives compensation. The format should include the following elements to stipulate all requirements regarding the organisation's formal relationship with the consultant.

Elements of A Contract Letter

Daily Rate. Your organisation should have a policy on how to determine daily rates for consultants. Consistency in following that policy is important so that you are fair to everybody you hire and avoid raising false expectations.

Maximum Number of Days. Contract days are expressed as a maximum number. The maximum should be a good estimate of how many days the assignment will take at most (but avoid over-estimating).

Maximum Total Payment. Multiply the daily rate by the maximum number of days. Again, you are not guaranteeing payment of this amount - payment is only for the number of days the consultant actually works.

Other Expenses. Does the organisation plan to reimburse the consultant for any expenses related to the job? Usually, consultants are expected to have their own books and reference materials, office supplies, including a computer, and local transportation.

Expenses which your organisation should cover include: workshop materials, long distance transportation or travel reimbursement, and meals, lodging and incidental expenses for out of town assignments.

Terms of Payment. When and how will the consultant be paid for the work? Some consultants require an advance payment, and some organisations cannot pay fees until the final report is submitted. If the consultant will incur extensive 'other expenses' during the assignment, the organisation should provide an advance as a percentage of the total anticipated. For example, if the consultant's per diem expenses are budgeted at \$200 for a five-day workshop out of town, the organisation might provide an advance of 80%, or \$160, prior to travel. The consultant will be expected to account for some or all of the expenses (depending on the organisation's per diem policy), and the organisation will settle the difference with the final payment.

Ownership of the Training Material Developed. Normally, any training material the consultant develops will become the property of the organisation. Still, the organisation should agree to acknowledge the author of the material.

Who Will Do the Job. If you are contracting a consulting firm or organisation to conduct training, you should specify the person you want to carry out the work.

Benefits. Normally, contracting organisations do not provide health benefits or other insurance coverage for consultants. It is wise to clarify this issue in the contract letter.

Terms of Reference. This is one of the most important sections of the contract. The Terms of Reference section should detail exactly what the consultant is expected to do to complete the contract. The consultant should not be expected to do activities which are not included in this section, so it is better to be clear and as detailed as possible. Don't assume anything, especially if you are hiring a consultant for the first time. The terms of reference are also referred to as the 'scope of work'.

The contract letter states the maximum amount you can pay the consultant. It will not be possible to pay more. Therefore, consultants should never be asked to work more than the maximum number of days and expect to get paid for it. If the job takes longer than expected, the contract should be renegotiated as soon as possible with the contractor. The contract can then be amended to include additional days (if the budget can accommodate it). It is best to have a good estimate of the maximum number of days when the original contract letter is written.

Many organisations seek to develop long-term relationships with their training consultants - it's good for both sides. The consultant will enjoy the security of knowing that he or she is valuable to the organisation in the long-term and your organisation will have access to a trainer it knows well and trusts. This approach eliminates the need for extensive orientations and negotiations each time a trainer is hired. Long-term consultants can become important stakeholders in the organisation. In fact, some refer to such consultants as 'adjunct faculty.' Let the consultant know that if the job goes well, there may be other opportunities later on.

Developing the Content of the Training Event

The checklist presented at the beginning of this chapter dealt chiefly with organisation and logistics. It did not address questions relating to the content and methodology of the training. Along with the administrative considerations in preparing for the training, the Training Officer needs to develop the content of the training event itself and determine who should participate. The following section demonstrates how to develop the content for your training activities. It builds upon the training needs assessment described in Chapter 2.

So, it turns out that we will need you for 3 more days to complete the training but we have no funds! Will that be a problem?



Be realistic in your planning. Avoid having to re-negotiate the number of days or the terms of reference once the work has started.

Long-term relationships with consultants help to make the training consistent and better focused on the needs of employees.

Edward, I would like to hear your views on our new strategy. You seem to understand our organisation pretty well.

Sure, I have some ideas from our most recent training event.



It's important to start with clear goals and objectives.

Content development comprises three basic steps:

- ❶ Define training goals and overall objectives
- ❷ Identify major topic areas; and
- ❸ Communicate with the participants.

❶ Define the Training Goal and Overall Objectives

The *goal* explains what the training event is meant to accomplish in general terms. The goal should be able to tell what the training event is about and which participants will attend.

Each overall objective indicates what the training will accomplish in each of two or more major topic areas.

The fundamental difference between goals and objectives is that objectives are more specific than goals. In other words, attainment of your objective will lead to reaching your goal.



Exercise: How to Improve Goals and Objectives

❶ Training workshop goal as stated:

'At the organisation/management unit level, the course was aimed at assisting in the efficient utilisation and development of human resources for better performance.'

COMMENTS:

1. The objective could be tightened up by eliminating the words 'was aimed at.' It sounds as if the workshop tried to do something it couldn't do.
2. All workshops assist in one way or another. How will this workshop assist? Be more direct and begin the objective with a verb that shows what the workshop will accomplish vis-à-vis the participants. Use the infinitive form ('to ---') to make the objective more active.
3. Who is the workshop assisting? There is no mention of who the participants are.
4. 'At the organisation/management unit level' is ambiguous. Were there other levels as well? If the participants were mentioned in the objective, this part would not be necessary.

POSSIBLE REFORMULATION OF THE GOAL:

'To improve the knowledge and skills of protected area managers (PAMs) in human resource management.'

② Training workshop objectives as stated:

1. Increasing PAMs' understanding of the general concepts and principles of management
2. Helping PAMs to understand the different leadership techniques/qualities
3. Increasing PAMs' knowledge of supervisory management processes
4. Assisting PAMs to develop performance objectives and standards
5. Increasing PAMs' knowledge of performance management

COMMENTS:

Use the infinitive ('to ---') form of the verb instead of the gerund (---ing) form. 'To increase' sounds more active than 'increasing.'

Try to use a variety of verbs in a list like this; otherwise, it becomes too redundant. In addition to the verb 'to increase,' you can use words like 'to develop,' 'to strengthen,' 'to broaden,' and still get the same idea across.

In general, the objectives can be more direct. Rather than saying 'to increase PAM's knowledge of the basic principles,' you could say 'to explore the basic principles of.' It is already understood that the objective is aimed at the participant because the participant is mentioned in the workshop goal, and therefore it is not necessary to mention the participant each time.

③ Training workshop objectives as stated:

1. To review community based conservation as a global challenge and explore how it links with sustainable development.
2. To examine the strategies and case studies of community involvement in and around protected areas in Africa.
3. To explore means and ways of collecting information.
4. To review benefit-sharing experiences.
5. To examine the roles and challenges of nongovernmental organisations and the private sector in community conservation related issues.

COMMENTS:

In general, these objectives are well formulated. Unfortunately, there is no workshop goal that ties them all together. Although it is clear that the workshop is about community conservation, we can't be sure who the participants are without a workshop goal. One possibility for the workshop goal is, 'To develop in protected area managers increased awareness of, and practical skills in, a variety of community based management approaches.'

Objective #2 could be more concise if reworded as follows: 'To examine strategies of community involvement in and around protected areas in Africa.' In an overall objective, it is not necessary to mention the training methodologies that the workshop will use; therefore, case studies can be dropped. Furthermore, using the word "approaches" doesn't add much to the overall idea of the objective.

Objectives #3 and #4 could be more specific: Collecting information on what? Benefit sharing activities related to what? For example, these objectives could read: 'To explore ways of collecting information on the attitudes of community members toward poaching' and, 'To review benefit sharing activities and experiences in alternative revenue sources in communities.'



If your intention is to train in priority areas, limit your topics and ensure that there is enough time planned to address training needs thoroughly.

Our subject area is environmental education. Topics may include: lesson plan development, materials design, teaching skills, interpretation, use of traditional drama and so on. To narrow down the choices, let's review needs assessments and performance appraisals and consult supervisors before making our decision.



● Identify Major Topics

Any given subject area contains countless topics and it may be difficult to determine which topics are most important. At this point in the process, you should try to avoid covering too many topics in the few days available for your training event. Remember, training events are meant to cover more than *topics* - they are meant to develop *knowledge, skills and attitudes*.

There are two sources of information you should refer to in order to identify your major topics - documents relating to the performance of participants on their jobs and resource people who are familiar with the training event theme.

In principle, your training plan was designed based on information from a training needs assessment (Chapter 2). The needs assessment report should provide some justification for conducting the training course, although it may not contain detail beyond the level of simply listing topic areas. If interviews or open-ended questions were used to create the needs assessment, more detailed information may be available concerning major topics. Supervisors' reports may also be a good indicator of training needs.

Resource people are another good source of information on topics. Resource people may include supervisors, experts within collaborating agencies (other donors or international implementing agencies) and trainers. Review your approach with them and ask for their advice on topics. It is advisable to go through a list of potential topics with a resource person, if for no other reason than to validate your own findings.



E EXAMPLE OF A COURSE CONTENT ANALYSIS

In preparing for a workshop on management skills, the Training Officer developed a list of topics that would be appropriate for the workshop, on the basis of information he had. The Training Officer met with the trainer hired for the workshop, who had developed his own list of topics.

After discussing their lists, the trainer and the Training Officer agreed on a common list of workshop topics, as follows:

Workshop topics

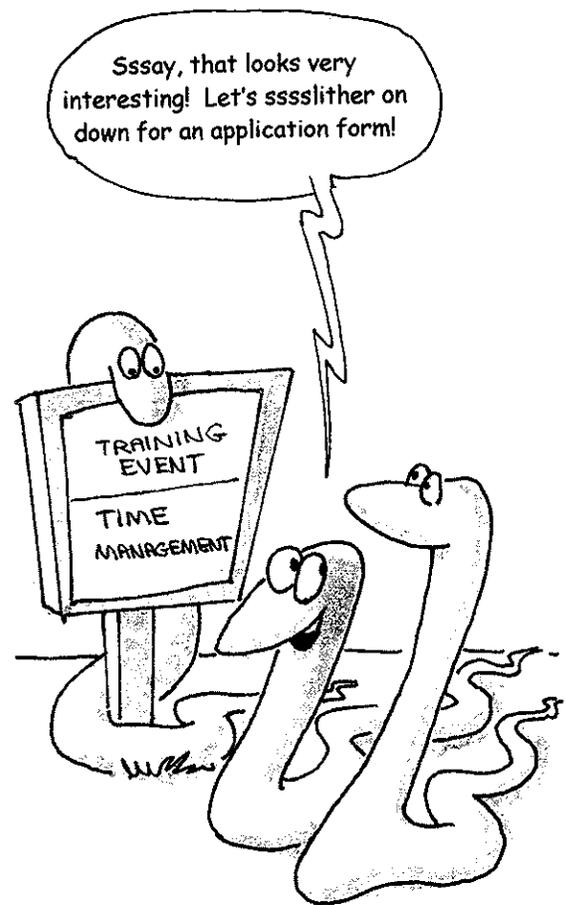
Week 1:

- Key management constraints and issues in the context of wildlife management
- The management process:
 - key management functions, principles and problems
 - essential skills in the context of service organisations
- Problem solving and decision making techniques
- Elements of strategic management
- The leadership process:
 - styles and implications
 - essential interpersonal skills
 - how to influence and motivate people
 - team building
 - communication issues and constraints
- Supervisory skills and management

Week 2:

- Job descriptions
- Training and staff development
- Performance management process
- Field visit
- Budgetary process: issues and constraints
- Management of change
- Action planning for follow-up

Work closely with trainers when designing training and selecting topics. Draw from the trainers' experience. Combine your understanding of the organisation's needs with the trainers' expertise to develop the most effective approach possible.



6 Communicate with Participants

As all good trainers know, communication is a two-way process. The workshop organiser requires information from the participants to assess needs and formulate appropriate programmes. The participants require information from the organisers regarding the objectives, content and scheduling of the training. Workshop participants seldom complain of receiving *too much* information. According to the Principles of Adult Learning (discussed in Chapter 7), participants who are well prepared are in a much better position to learn.



You should have enough information from the participants to ensure that the training will meet their needs. Although there may have been a general needs assessment which indicated that training is a priority, it is helpful to have more detailed information regarding which specific areas should be emphasised during the course.

Application forms may be used to obtain vital information and create good two-way communication flow between you and the participants.

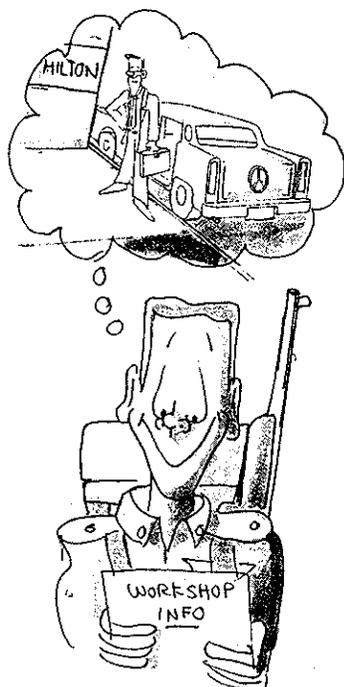
Sample Course Application Form <i>From the College of African Wildlife Management, Mweka, Tanzania</i>	
Tourism and Visitor Satisfaction Management Training	
Introduction: To plan this course to meet the needs of participants, we would be very grateful if you took some time completing the application form enclosed and get the endorsement of your supervisor before it is returned to us for further action.	
1) Name of applicant	
2) Organisation/project	
3) Address	
4) Job title	
5) Formal qualifications (Secondary School, degree, etc.)	
6) Pre-service training received (certificate, diploma, degree, etc.)	
7) In-service training received	



8) Current duties in your organisation a) What are the three most important constraints in visitor management in your area?	
9) What are the four most important complaints of visitors to your protected area?	
10) How is this course going to help your work?	
11) Are there some topics you would like to address that are not included in the course? If yes, what are they?	
Supervisor's Comments	
12) Do you feel that the applicant will benefit by attending this course? Explain specific benefits.	
13) How will the organisation benefit from the applicant's attendance in the workshop?	
14) On a 1-4 scale (1=very high priority 2= high priority 3= medium priority and 4= low priority) how important is the applicant's participation in this course?	1-----2-----3-----4
Supervisor's name	
Signature	



Make sure that the information provided to the participants is clear and doesn't raise any false expectations. Tell them everything they will have to know about the venue and schedule.



To prepare participants for training events, the Training Officer should communicate the following information:

- dates of the workshop
- address of where participants will be accommodated, telephone numbers, fax numbers
- address, telephone, and fax numbers of workshop organisers
- how participants should travel to workshop site
- expected climatic conditions, special clothing requirements (for field trips)
- training topics to be addressed
- expected workshop schedule
- rooming conditions, meals and allowances provided
- what information or materials participants should bring
- what research, reading or other preparation they should to do before the workshop

Consider these elements when drafting workshop announcements

- workshop title
- introduction and background information
- participant profile
- venue
- criteria for participant selection
- costs
- mode of application
- workshop goals and objectives
- description of the training methodology

The participant profile should include information on what type of person the training is designed for.

Be clear about the costs and compensation for travel and lodging.

Be clear about the application process and the relevant dates.

For in-service training workshops, a two-step process may be used to exchange pre-training information between the organisers and participants. This approach may assist the workshop organiser in identifying appropriate participants for their training activities.

Step 1 Announce the course to heads of institutions which may be interested in sending participants. Attached to the announcement should be a questionnaire regarding expectations for learning during the workshop, priority training needs, and approval to attend the training. Ask the supervisors of prospective participants to complete the questionnaire and return it to you.

Step 2 Review the completed questionnaires to develop the final participant list. The questionnaires should provide you with an accurate picture of the participants, their expectations and needs. Draft invitations based on the list of participants and send them out. Remember, the invitation should include a detailed description of the workshop.

Summary

Organising training events is a complex task which requires foresight and discipline on the part of the Training Officer. A simple oversight in planning can jeopardise an otherwise well designed training event. To ensure that all important issues are addressed, the Training Officer may use the budget to create a checklist of tasks to complete in preparation for the training activity.

Selection of trainers is an important part of the preparation process. Good training design should be supported by trainers with the skills to implement participatory, experience based training. Training officers must be very careful in selecting the best possible trainer and working with her or him to prepare training sessions.

Training should always address the needs of the participants. Training officers are responsible for determining goals and overall objectives, and selecting the most appropriate participants for each training event. They are also responsible for communicating clearly and effectively with prospective participants.

This chapter represents the end of Section 2, 'Designing Training Plan Components'. The section was designed to introduce you to innovative training approaches, assist you in obtaining funding for your activities and guide you in the steps required to prepare for training events. By the end of the section, you should have a clear understanding of the Experiential Learning Cycle and how to use it to make your training more effective. You should also understand the importance of action planning to extend learning beyond workshops and other short-term training events. Chapter 4 emphasised the need for strategic approaches to obtain financial support for your activities and the final chapter in the section provided advice on how to prepare well organised training events and contract effective trainers. This section should have prepared you for Section 3, which focuses on the implementation of training activities.

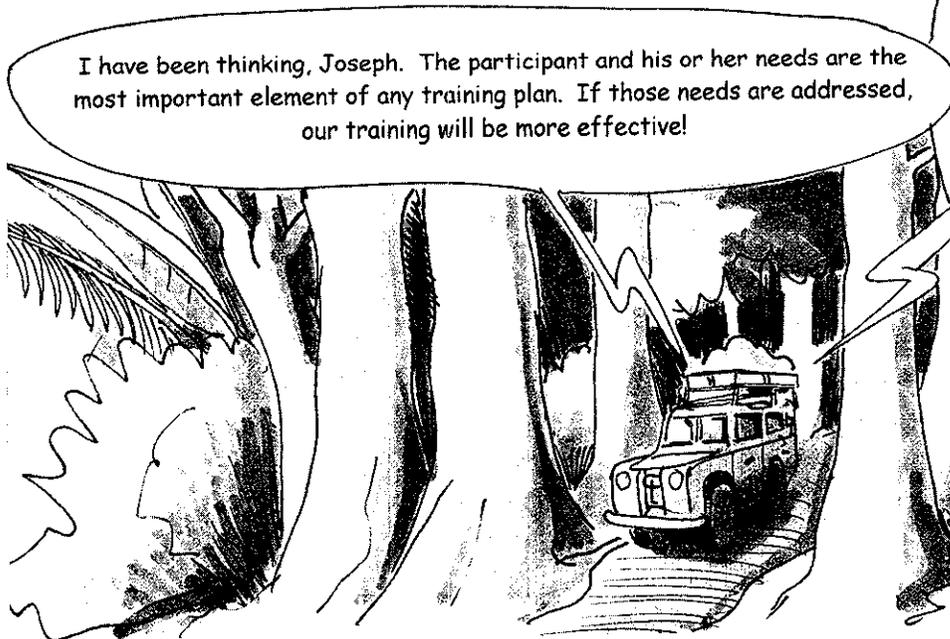
REFLECTION QUESTIONS

What are your personal strengths and weaknesses in organising administrative and logistical matters relating to training?

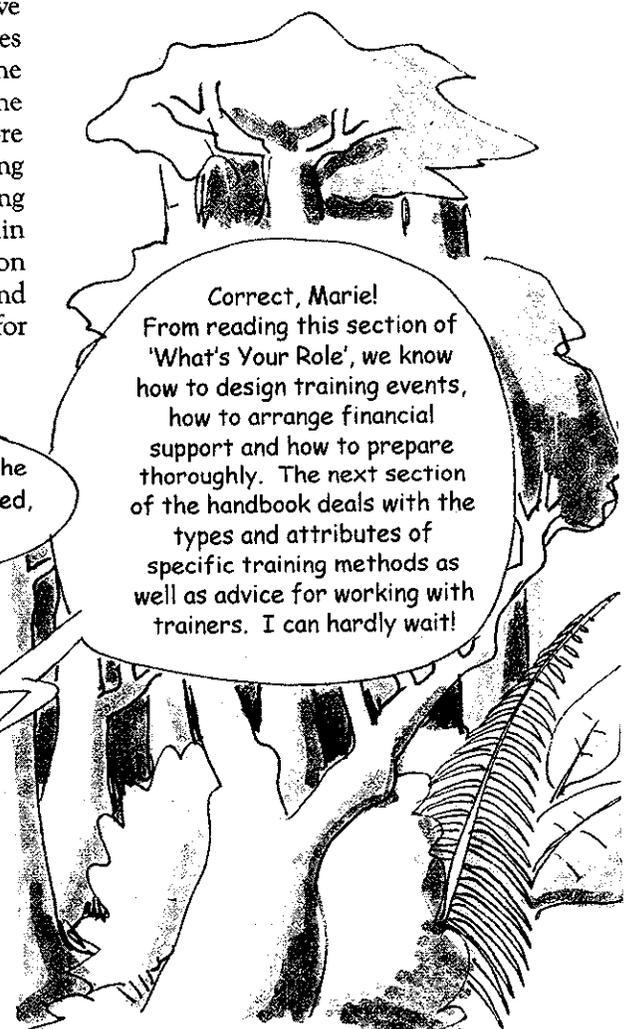
Are there professionals within the organisation with potential to act as trainers? Are they available?

Where can you go to find out about working with new training consultants?

How much do you normally communicate with supervisors and participants prior to a training event? What could you do to improve this communication?



I have been thinking, Joseph. The participant and his or her needs are the most important element of any training plan. If those needs are addressed, our training will be more effective!



Correct, Marie!
From reading this section of 'What's Your Role', we know how to design training events, how to arrange financial support and how to prepare thoroughly. The next section of the handbook deals with the types and attributes of specific training methods as well as advice for working with trainers. I can hardly wait!

Section Three

IMPLEMENTING TRAINING ACTIVITIES

THIS SECTION INCLUDES

**Chapter 6 Working with Trainers
&
Chapter 7 Conducting Training**

This section brings the reader into the training room with practical guidance for conducting participatory, experience-based training sessions. Those who have participated in a training event will recognise activities and approaches they have seen trainers use in other workshops. Those who read this section from the perspective of a trainer may feel encouraged or challenged by what is presented. Trainers who work with open minds, continuously trying to improve their work and create new exercises to use in training should find this section stimulating and reaffirming. For many trainers, this will be the most challenging section of 'What's Your Role?' because it discusses approaches that many are familiar with, but are afraid to try. There is one very good reason for trying new approaches to training: trainers need to practice what they preach. Learning is a continuous process of risk-taking and experimentation, and as the trainer explores new possibilities for enhancing job skills through training activities, he or she will become a more experienced professional.

Chapter Six

Working with Trainers

The previous two sections of the handbook addressed the Training Officer's planning, organisational and fundraising responsibilities. In this chapter, we focus on methods for working effectively with trainers and using a variety of specific training techniques.

As a training officer, you must ensure that effective and innovative training is planned and carried out based on the needs of your organisation and its employees. An important part of this responsibility involves working with trainers to conduct training workshops. Although you may not conduct the training yourself, it is important to fully understand the principles of participatory, experience-based training exercises. This chapter should serve as a guide for training officers to help them supervise trainers in the design and implementation of training, and it may be useful as a reference for the trainer as well. The chapter will revisit the Principles of Adult Learning, behavioural objectives, and the Experiential Learning Cycle, introduced in Section 1 of the handbook. It concludes with a focus on good facilitation skills. By the end of Chapter 6, you should be familiar with the principles of working with trainers and you will be better prepared to ensure that effective training is conducted to support your organisation.

This chapter contains useful information for training officers and trainers. Training officers may use the information to guide trainers and ensure that workshops are as effective and innovative as possible. Pages 6-2 through 6-4 and 6-8 through 6-13 are specifically designed to be used by trainers to improve their approaches and effectiveness.

Adult Learning and Training

Chapter 1 introduced the basic Principles of Adult Learning. Now it is time to revisit those principles and see how they can be used to create a good learning environment.

According to adult learning theory, trainees learn best when training:

- is self-directed
- is based on an immediate need
- is participatory
- is experiential
- is reflective
- provides feedback
- shows respect for the learner
- provides a safe atmosphere
- occurs in a comfortable environment

OBJECTIVES

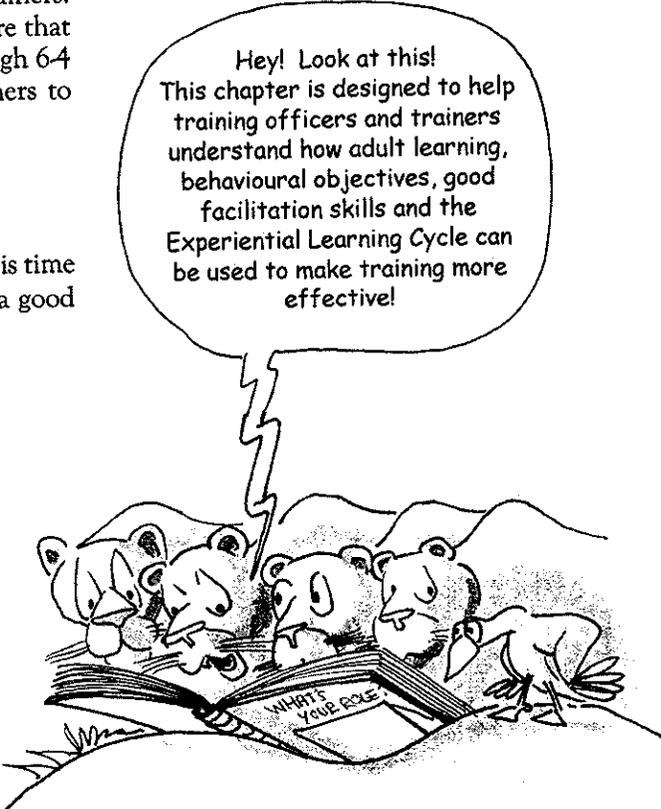
THIS CHAPTER WILL ASSIST YOU TO

Develop behavioural objectives to target behaviour change.

Apply the Experiential Learning Cycle within a training session.

Use facilitation skills in group discussion to ensure mutual understanding.

Assess the effectiveness of training sessions.



Hey! Look at this!
This chapter is designed to help training officers and trainers understand how adult learning, behavioural objectives, good facilitation skills and the Experiential Learning Cycle can be used to make training more effective!



Adult Learning

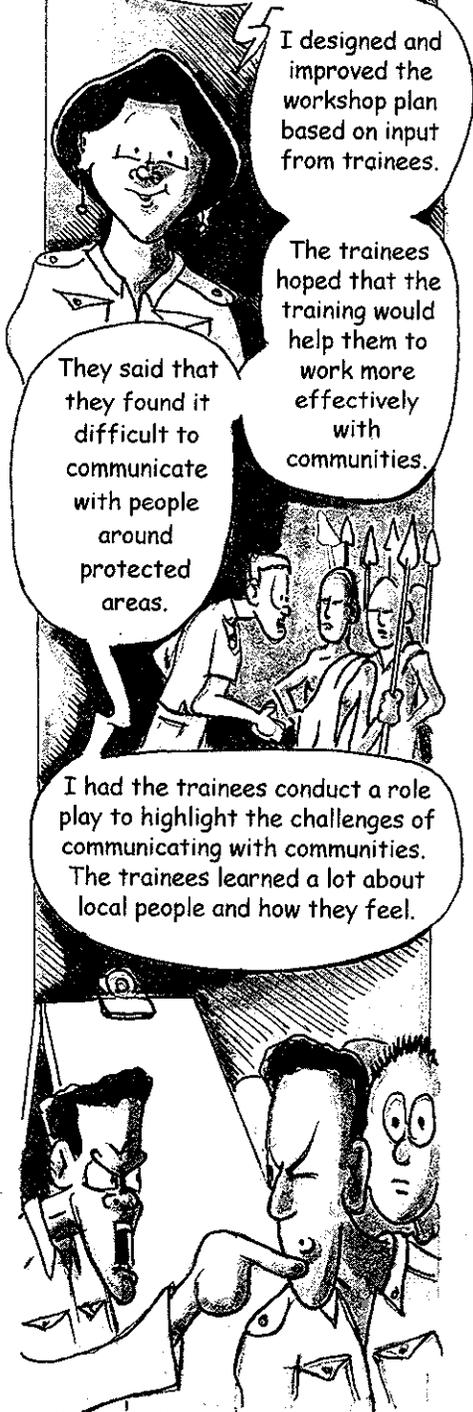
I developed a community conservation training activity using adult learning principles.

I designed and improved the workshop plan based on input from trainees.

The trainees hoped that the training would help them to work more effectively with communities.

They said that they found it difficult to communicate with people around protected areas.

I had the trainees conduct a role play to highlight the challenges of communicating with communities. The trainees learned a lot about local people and how they feel.



Improved Training Through Adult Learning

Training can be made more effective by implementing the following adult learning principles:

Make Sure Training is Self-directed: Participants know their own needs and they should share responsibility for their own learning. To ensure that learning is self directed:

- ❶ Discuss the content and methodology of the workshop with participants at the outset. Use their recommendations to improve the training.
- ❷ Introduce the training schedule to the participants and encourage discussion to decide on any changes or improvements which must be made. The trainer then has responsibility for fine-tuning the workplan during the course of the training event based on feedback from participants.
- ❸ Encourage participants to develop their own action plans so that they can apply lessons learned through the training to their own work.

Address Immediate Needs: Motivation to learn is highest when training addresses the needs which are most important to trainees. To focus on immediate needs, give each participant the opportunity to express his or her motivation for learning. Ask why they are participating in the workshop, what they hope to gain and how the workshop will increase their job performance. Then, focus the training on these needs.

Encourage Participation: Participation in the learning process should be active, not passive. Training which is based on experience and action is more effective and more memorable. Active participation should be focused on behaviour change and increased performance. To encourage participation:

- ❶ Have participants analyse problems and discuss issues in small groups as much as possible. Trainees may be too intimidated to speak in front of a large groups but they may enjoy problem solving with a few other people.
- ❷ Discourage direct criticism of workshop participants. Effective feedback techniques may be used to encourage direct and productive dialogue without personalising the issues.
- ❸ Have the participants establish working norms (ground rules) which indicate what they expect from each other and how they can best work together during the workshop.



Base Training On Experience: The most effective learning is based on shared experiences. In this way, participants learn from each other and the trainer often learns from the participants. To make your training experience based:

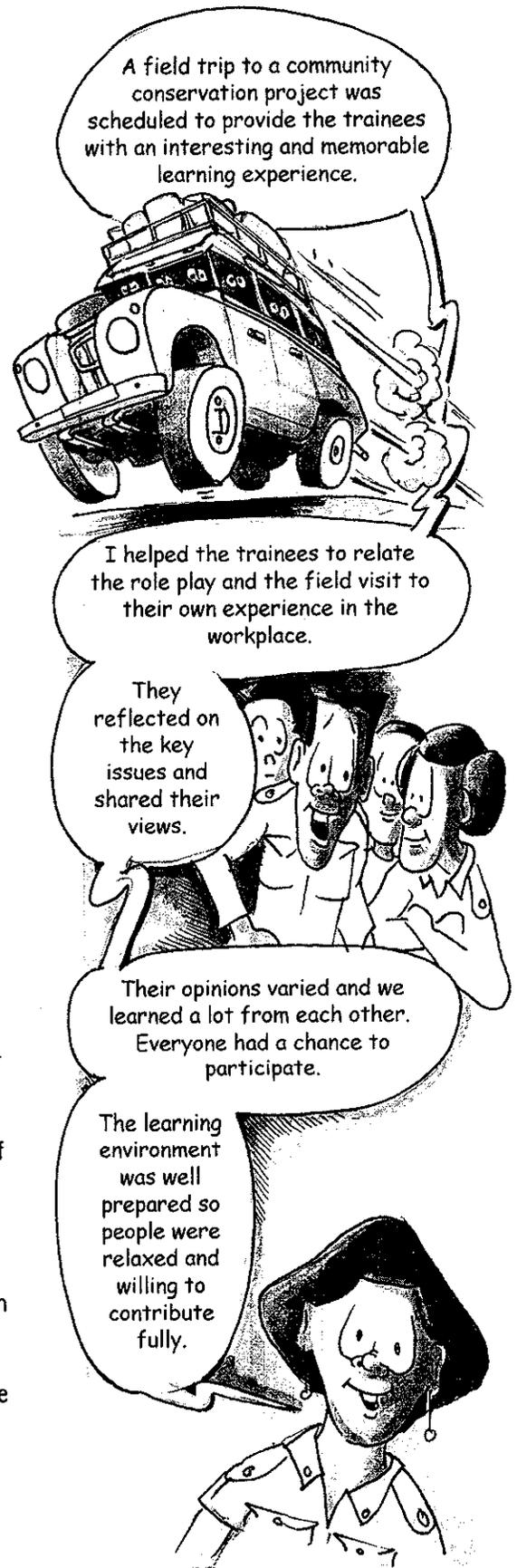
- 1 Encourage participants to use relevant experiences from their lives to serve as examples and case studies during the training.
- 2 Put issues and examples in a familiar context (refer to the section on experiential learning later in this chapter).

Allow for Reflection: Maximum learning occurs when participants are provided with the opportunity to reflect back upon their learning experience, draw conclusions and derive principles for application in their jobs.

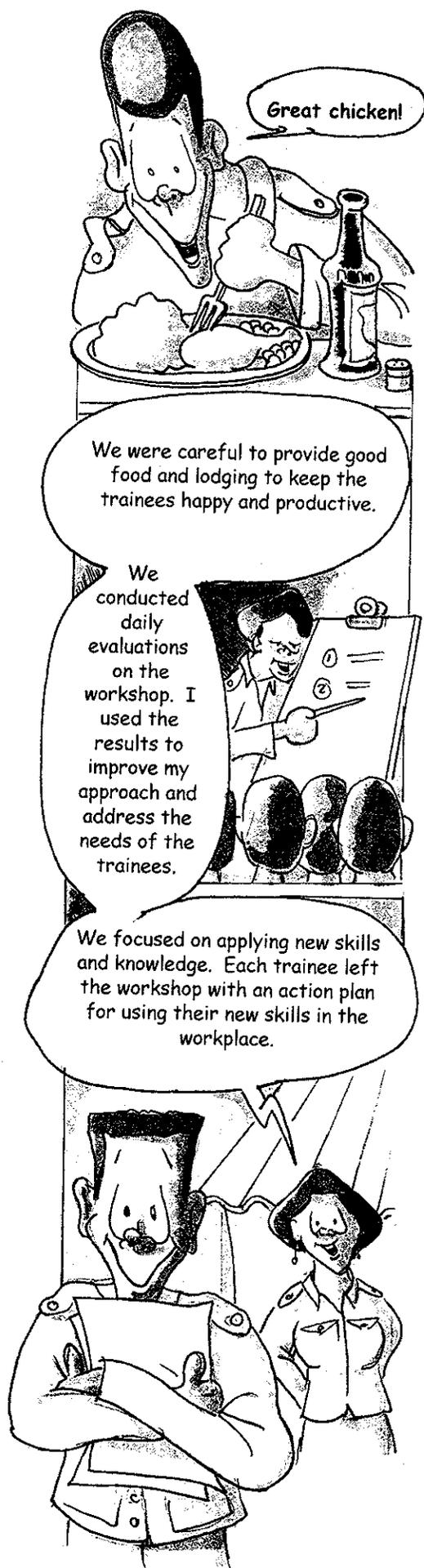
- 1 Encourage participants to discuss the issues which are important to them--those things which are giving them the greatest difficulty in their work. It is always comforting for participants to know that others are facing many of the same problems.
- 2 Participants should be assisted in identifying strategies for dealing with key issues. Many of these may be addressed through the development of action plans.
- 3 Plan follow-up activities which enable participants to periodically review their action plans and adjust them accordingly. As a trainer, plan to be involved in the follow-up to review progress and offer advice.

Show Respect for Trainees: Mutual respect and trust between trainer and trainee strengthens the learning process.

- 1 Never diminish the participant's status - be a role model by showing respect for everyone.
- 2 Understand and acknowledge each participant's cultural values (e.g., age, mode of addressing people).
- 3 Provide opportunities for trainees to share their skills, knowledge and expertise.
- 4 Be positive to everyone who contributes to discussions. Allow differing opinions even if you may disagree with them.
- 5 Encourage the trainees to comment on the content, pace and effectiveness of the training. Conduct regular evaluations and act on the recommendations.



25



Create a Safe Atmosphere: Cheerful, relaxed trainees learn more effectively than those who are fearful, embarrassed or angry. Make the atmosphere favourable to learning and participation.

- ❶ Participants must have the support of their supervisors when they attend the training activity, especially if the activity will keep them from their work for a significant amount of time.
- ❷ Provide accurate information about the workshop well in advance. Provide the information to trainees and their supervisors and make sure to include details regarding their participation and logistical arrangements.
- ❸ Begin training with a culturally appropriate ice-breaking exercise (joke, story, game).
- ❹ Be sensitive to current interpersonal relationships among participants (i.e., factions, cultural differences).

Provide a Comfortable Environment: Make your participants comfortable. Participants who are well fed, well rested, healthy and comfortable are ready to learn with maximum effectiveness.

- ❶ Select a site for the training that is pleasant, comfortable and conducive to learning through active participation.
- ❷ Schedule training well in advance so that participants can adjust their calendars and avoid scheduling conflicts.
- ❸ Respect customary meal times, or provide snacks and drinks during breaks.
- ❹ Address complaints which arise regarding accommodation and other comfort-related issues.

Provide Feedback: Corrective and supportive feedback makes training more effective.

- ❶ Trainers should not be the only source of feedback. Actively encourage participants to express their views on the issues and comments made by others. Encourage feedback from everyone, including the quiet participants, and acknowledge all responses.
- ❷ The trainer should acknowledge the value of different opinions. Avoid negative reactions to comments made by participants.
- ❸ Paraphrase statements to acknowledge individual contributions and reach consensus on the issues.
- ❹ Include interesting follow-up visits to the field or places of work to promote dialogue and feedback.

Using Behavioural Objectives

Behavioural objectives are statements which describe how trainees should demonstrate enhanced knowledge, skills and/or attitudes once they have learned something new. Behavioural objectives are more specific than the kinds of activities indicated on a job description or a performance appraisal. In the context of training, behavioural objectives are focussed on what participants should learn and what behaviour change should take place as the result of a training session. Remember, job competence is measured not only by what a person *knows*, but also by what a person is capable of *doing*.

To Use Behavioural Objectives:

- 1 *Define what you want the trainees to be able to do as a result of the training. Decide on what action you want them to be able to take.*

Think in general terms about the task on which the training session is focussed. If necessary, refer back to your training needs assessment. Consider what area of work requires the most improvement and then think specifically about what exactly should be expected of the trainees.

- 2 *Determine the knowledge, skills and attitudes required for the trainees to accomplish behaviour change.*

If you have conducted a task analysis, then you are already aware of the general knowledge, skills and attitudes expected for effective performance. You may need to consult job descriptions to confirm the skills you want to develop during the training. Focus on tasks directly related to the training topic.

- 3 *Specify how the behavioural objective can be used to show that training has been successful.*

The trainee's performance following the training event should help us to determine the degree of behaviour change, i.e. improvement in knowledge and skills, and change in attitudes. Behavioural objectives must always be based on an *action verb*. Using an action verb indicates that the trainee must do something to demonstrate learning success. This is different from using words which do not require any demonstrable action (such as to understand, to know, to feel) ~ they don't require the learner to do anything that we can observe.

Combine the Elements: The guidelines listed above will help you to draft a set of specific and clearly expressed behavioural objectives. Ask a colleague to review your objectives with you to ensure that they meet the above criteria. See the next few pages for ideas on how to perfect the wording of behavioural objectives.

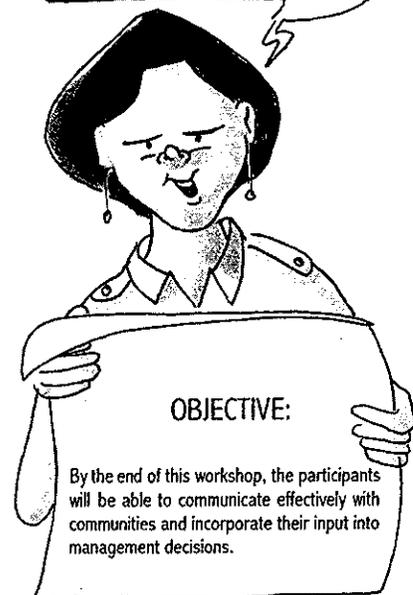
I BASED MY WORKSHOP ON
**BEHAVIOURAL
OBJECTIVES**

I wanted my trainees to be able to communicate effectively with community representatives.

I knew that for the trainees to do this, they would have to understand why communication is important.

They would require good communication skills and a positive attitude towards communities.

I planned to test the workshop's success by observing whether the communication skills are used and the communities' inputs listened to.



Good behavioural objectives allow for measurable performance change. Keep objectives simple and focussed.

Perfecting Behavioural Objectives

When drafting objectives, consider the following criteria:

- ✓ verbs should be used to describe what action the trainee needs to take. The wording should suggest an observable action
- ✓ the objective should be presented using the phrase: 'by the end of the session, the participant will be able to...'
- ✓ the action described by the objective should be very specific
- ✓ the action should take place within the context of the training situation
- ✓ the objectives should focus on the trainee

The following suggests key words to use when formulating your objectives. Select word choices based on whether the your objective emphasises ❶ knowledge, ❷ skills or ❸ attitudes.

❶ *Emphasising knowledge acquisition:*

Objectives focussed on knowledge/information/facts should incorporate verbs such as

list	explain
name	describe
tell	recount

❷ *Emphasising skills development:*

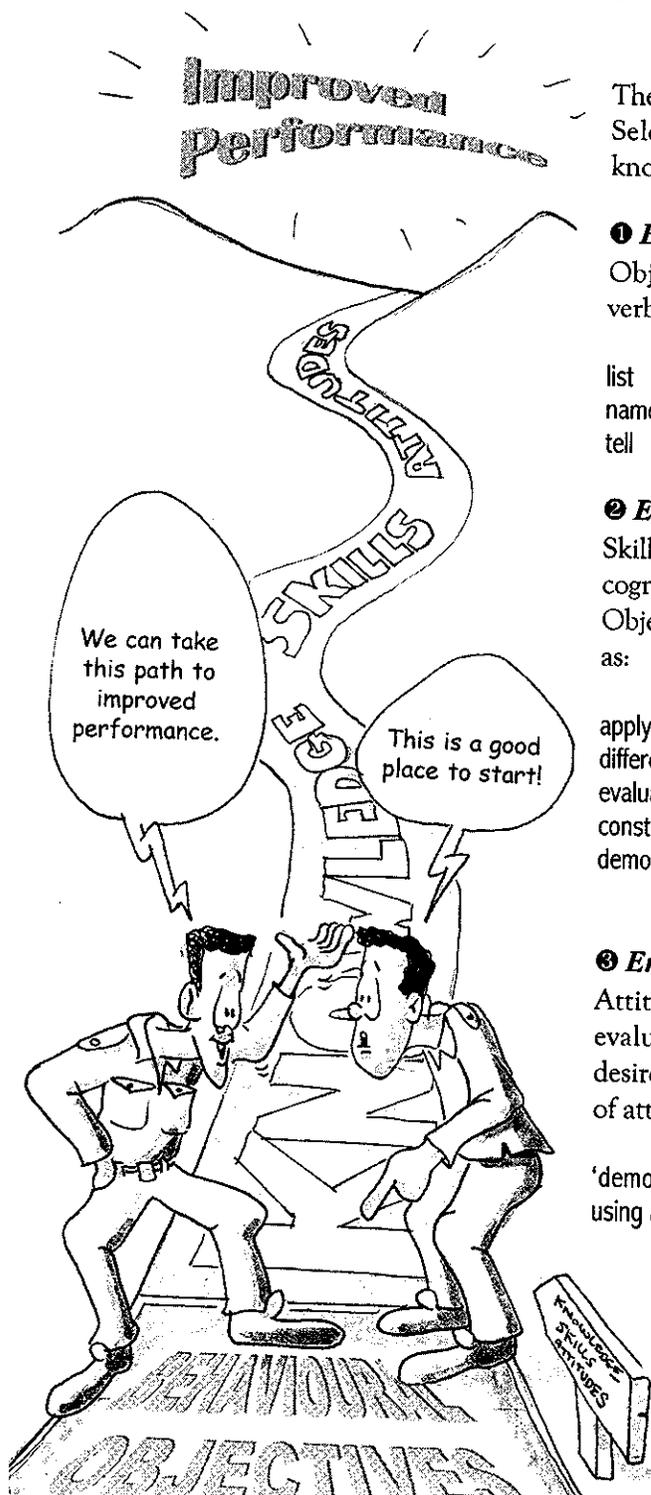
Skills may take many forms including manual skills, communication skills, cognitive skills, problem solving/decision making skills and leadership skills. Objectives which focus on development of new skills incorporate verbs such as:

apply	use	plan
differentiate	compare	examine
evaluate	analyse	implement
construct	develop	generate
demonstrate	create	decide

❸ *Emphasising attitudinal change:*

Attitude changes are the hardest to promote and the most difficult to evaluate. Observations of a trainee's behaviour will indicate whether the desired changes in attitude have taken place. Objectives focussed on change of attitudes should use phrases such as:

'demonstrates ____ by ____' (e.g. 'demonstrates respect for staff subordinates by using active listening skills, open-ended questions, and paraphrase during a conflict')



Training which is based on attitude change often focuses on building the trainee's confidence to apply new knowledge and skills. The training may also focus on respect and understanding for other colleagues.

Action verbs which may be used to promote attitude change include the following:

volunteer	agree	choose
recommend	defend	endorse

E Exercise: REVISING OBJECTIVES

Below are three sample objectives, comments regarding their wording and suggested revisions. Use these examples to see how your objectives may be improved.

Objective 1: *To increase the participation of women in community based anti-poaching activities.*

Comment: Given the limitations of a single training workshop, the objective may not be realistic. Most likely, trainees would need more time to attain this objective. The objective should be more focussed

Revised Objective: *By the end of the workshop, the participants will be able to develop a plan of action for increasing the participation of women in community based anti-poaching activities.*

Objective 2: *To do a job description.*

Comment: The objective is too general, and the verb 'to do' isn't clear in its meaning. It implies that the participant could develop any job description to attain the training objective. Be specific.

Revised Objective: *By the end of the workshop, the participants will be able to draft a job description for a guide in Highlands Game Reserve following the format established within the Ministry of Wildlife.*

Objective 3: *To understand what a protected area manager is supposed to do.*

Comment: The verb 'to understand' is not an action verb. It would be difficult to gauge the success of the training. Be more specific about what the learner should be able to do to demonstrate understanding.

Revised Objective: *By the end of the workshop, the participants will be able to describe the six primary functions of a protected area manager.*

Sample Objectives

from the Department of National Parks and Wildlife Prosecutor's Course Malawi

By the end of the training, the participants should be able to:

Describe the criminal procedure for making arrests and treatment of suspects.

Describe the requirements of the new Parks and Wildlife Act stipulated in the new constitution.

Distinguish admissible and inadmissible evidence according to the Law of Evidence in Malawi.

Explain statutory law requirement in Malawi.

Explain conditions of service of staff in Department of Parks and Wildlife as outlined in the Malawi Public Service Regulation and the Civil Service Commission regulations.

Write letters, memorandums, and summonses effectively.



Include each phase of the cycle in your training to ensure that your training is effective.

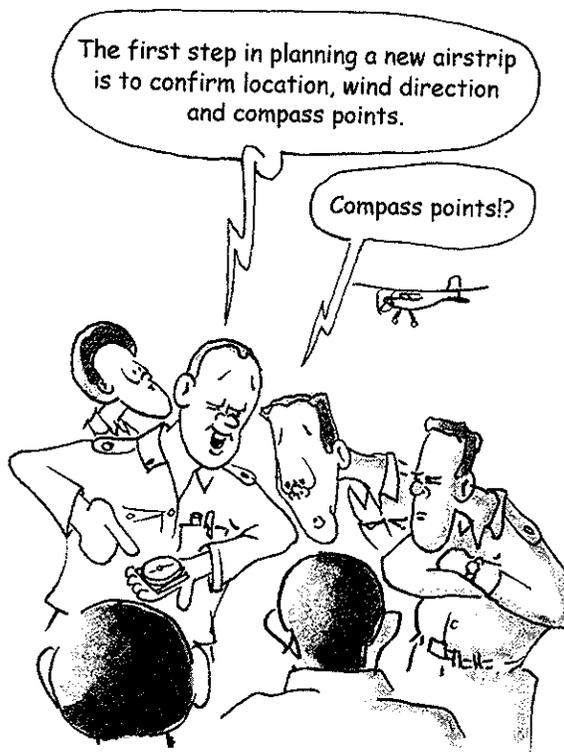
Experience can take many different forms but make sure that it involves participation and is relevant to the topic.

Using the Experiential Learning Cycle

The Principles of Adult Learning provide guidance on how to increase the impact of training by addressing the trainees' needs and by using participatory methods. *The Experiential Learning Cycle* can also be used to help you to develop effective and innovative training activities. The Experiential Learning Cycle is composed of the four phases of the learning process. It represents the way adults learn in everyday life.

In Chapter 3, the Experiential Learning Cycle was presented as a model for designing training approaches which incorporate the experiences of participants and encourage reflection and discussion. The same model may be useful to you when you design specific training sessions.

This section shows how training sessions can be designed which incorporate the cycle's four phases: *experience*, *reflection*, *conclusions* and *application*. In order to use the Experiential Learning Cycle as a guide for training, you should understand what each of the four phases means and how they can be used in the training environment. The Experiential Learning Cycle encourages trainees to think for themselves and become active participants in their training. In using the cycle, information is not simply provided to trainees; rather the trainees are required take an active role in exploring the issues themselves. As a result, participants feel challenged and training has a much stronger impact.



The trainer's primary role in this phase is to provide structure for the learning experience. He or she must present the objectives of the activity, clarify rules and establish time limits.

Starting the cycle. First, it is important to establish a good learning environment for participants. To start:

- ✓ gain the participants' attention and interest
- ✓ create an informal rapport with your participants
- ✓ recall experiences relevant to the training topic
- ✓ provide a link between previous sessions and this one
- ✓ present the behavioural objectives to the participants and make sure that they understand them
- ✓ let the participants know what they will do during the session in order to reach the objectives

Phase 1- Experience. Once your participants are ready for the training session to begin, move on to Phase 1 of the learning cycle. To implement Phase 1, introduce an activity in which the trainees 'experience' a situation relevant to the objectives of the training session. The experience might be a role play, case study, simulation, field visit or group exercise. The participants will use this experience as the basis for discussion during Phase 2.



If the session begins with a presentation rather than a more interactive exercise the presentation should be followed by an exercise where trainees are required to participate actively. Options for follow-up may include techniques such as a case study, role playing, problem solving discussion or a field visit. (These and other techniques are described in Chapter 7).

Phase 2- Reflection. During the second phase the participants should be encouraged to reflect upon the experiences of Phase 1. When adults encounter a new or unusual experience, their first impulse is to discuss the experience with others. The objective is to think about the experience and make some sense of it all. This is exactly what Phase 2 is about - participants are encouraged to share their ideas about the training experience. At this stage, the following takes place:

- the trainer guides a discussion about the experience
- participants share their reactions
- participants contribute to problem solving discussions
- feedback is promoted involving participants and the trainer

To help participants reflect, ask questions about what happened in the experience and what reactions they had. Examples of the kind of questions you might ask include:

- ❏ What happened?
- ❏ How did you feel when it happened?
- ❏ Did anyone feel differently?
- ❏ What did you notice about it?
- ❏ How do you feel about the experience?
- ❏ Did anyone else feel the same way about that?
- ❏ Do you agree/disagree with what they are saying? Why?
- ❏ Does anyone else have something to add?
- ❏ Does this surprise you?
- ❏ Do you realise that...?
- ❏ Why didn't you....?

Remember, open-ended questions stimulate discussion and feedback.



Interest the trainees. Make the experience phase as participatory as possible to allow the trainees to learn by doing.



The trainer's role during this phase is to help trainees reflect on the training experience. The trainer should ensure that the discussions are complete and the most important aspects of the experience are addressed.

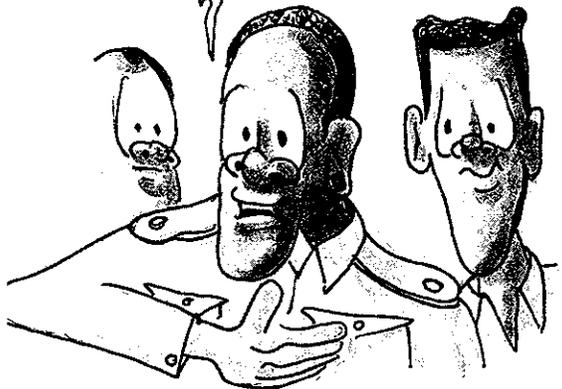


The trainer's role in Phase 3 is most like the conventional role of the educator--that of a guide to the participants.



How would the lessons apply in your workplace?

There are many cows in my area. We would have to discover how to keep them off the airstrip.



The trainer's primary role in this phase is that of advisor to the participants. As participants test their new skills and knowledge, the trainer provides feedback and helps them to build on their new skills.

Phase 3- Conclusions. During this phase, the participants identify the key points which have come out of the discussions. The trainer helps participants draw general conclusions from the experience and reflection. This is the phase where lessons are learned ~ where participants decide what the training experience means to them. In this phase, participants are required to draw conclusions about the training experience, make generalisations and derive principles from what they have learned.

The trainer acts as a guide and helps participants to comprehend what they have learned. There are two basic approaches to doing this: the trainer can provide the summary (as in a lecture or reading assignment), or the trainer can ask probing questions that enable participants to reach their own conclusions (as in a consensus seeking discussion). The latter approach requires strong facilitating skills. More than in any other phase, the trainer needs to be knowledgeable about the subject matter and have credibility as a good information source. This does not mean, however, that the trainer should provide all the answers. By solving problems themselves, participants internalise the information more successfully.

Some useful questions the trainer might ask include:

- ❶ What did you learn from this?
- ❷ What does all of this mean to you?
- ❸ How does all that we're talking about fit together?
- ❹ Have you gained any new insights?
- ❺ What are some of the major themes we've seen here?
- ❻ Are there any lessons to be learned?
- ❼ What do you associate with this?

Phase 4- Application. At this point, participants are required to make a link between the training event and how to apply their new knowledge, skills and attitudes on the job. Phase 4 strengthens the link by providing practice and/or planning for application of the lessons following training. This phase may be carried out by:

- ❶ Instigating discussions on how the participants will apply their new skills and knowledge on the job. Base your discussions on the conclusions from Phase 3.
- ❷ Encouraging participants to discuss problems which they are likely to encounter when applying what they have learned.
- ❸ Promoting discussion on how the participants will overcome difficulties in applying their new learning.



Questions to ask during Phase 4 may include:

- ❶ What have you enjoyed most about the session?
- ❷ What do you find most difficult?
- ❸ How can you apply this in your own work situation?
- ❹ Can you imagine yourself doing this in two weeks?
- ❺ What do you look forward to doing most after training?
- ❻ What do you think will be most difficult when you apply your new skills?
- ❼ How would you do it differently on your own project?
- ❽ How could this exercise have been more meaningful to you?
- ❾ Do you anticipate any resistance when you return to your job?
- ❿ What can you do to overcome resistance from others?
- ⓫ Are there areas you would like to practise more?
- ⓬ What are some of the questions you still have?
- ⓭ How could you improve application of new skills in the future?

Finishing up

The following steps should be taken to conclude the training session:

- ❶ Briefly summarise the events of the training session, or ask a participant to do so.
- ❷ Ask the participants to refer to the objectives and determine how well they were addressed.
- ❸ Encourage discussion on what needs to be done to follow up the training and further learning in the subject area.
- ❹ Provide links between this session and the rest of the training programme.

Improved Facilitation Skills

Trainers are often referred to as *facilitators*. To *facilitate* means to 'make easier', and so a *facilitator* is someone who makes it easier to hold discussions, share views and participate actively in learning. Facilitation skills can only be properly developed through practice.

Good facilitation incorporates a combination of verbal skills (things said) and non-verbal skills (the messages given through actions). Together, these skills can help you to create a good rapport with participants and be an effective facilitator. The next section addresses some of the main principles of facilitation and provides ideas on how facilitation can be used to improve your training.

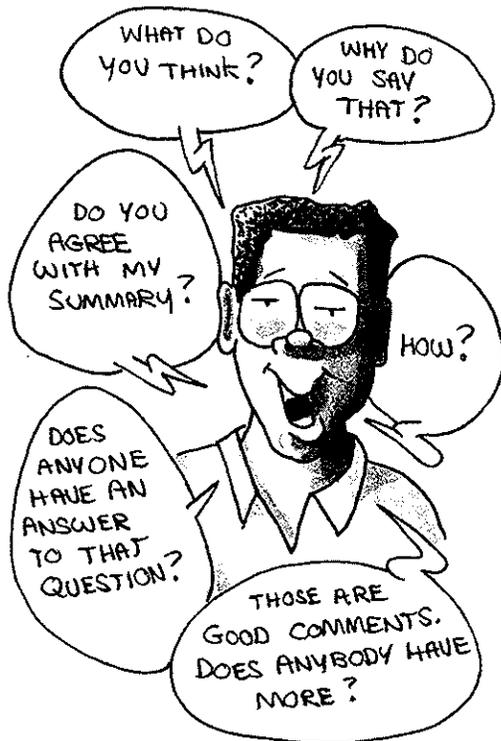
Don't leave training sessions unfinished. Be sure to end with strong conclusions and plans for follow-up.



Facilitation is easier for some people than others but even those who don't enjoy public speaking can become good facilitators.



Move around without distracting the group (avoid pacing or addressing the group from where people can't see you).



Use good verbal facilitation to keep training active and participatory.

Practical Facilitation Skills

You can improve training through use of non-verbal facilitation skills by:

- ✓ Maintaining eye contact with everyone in the group as you speak. Keep your attention equally focused so that you don't appear to be favouring certain people in the group.
- ✓ Circulating around the room as you speak. Move about to involve all of the participants.
- ✓ Reacting to what people say by nodding, or smiling, or using any behaviour which demonstrates that you are listening to what they have to say.
- ✓ Standing in front of the group. Don't sit -- particularly at the beginning of the session. It's important to appear relaxed and at the same time be direct and confident.

You can improve training through the use of verbal facilitation skills by:

- ✓ Formulating questions in a way that encourages people to talk. Open-ended questions will help. Ask what they think, why, and how. If participants respond to questions with simple 'Yes' or 'No' answers, encourage more thorough responses by asking: 'Why do you say that?' This will help you to assess the understanding of the participants.
- ✓ Asking participants if they agree with statements made by resource people and their fellow participants.
- ✓ Being aware of your tone of voice, and speaking slowly and clearly -- especially if the participants come from another country.
- ✓ Encouraging the participants do more talking than you do. Be aware of the percentage of time you speak compared with the percentage of time the participants speak. Try not to answer all questions yourself. Remember that participants may answer each other's questions. When questions arise, ask, 'Does anyone have an answer to that question?' Encourage all the trainees to contribute to the discussion.
- ✓ Paraphrasing the participants' comments by repeating them in your own words. This enables you to confirm what is meant by each comment and it helps to reinforce key points which arise through the session.
- ✓ Summarising key points in the discussion to be sure everyone understands them. Use regular summaries to keep the discussion going in the direction you want it to go. This is a good time to draw conclusions and discover if there are disagreements.
- ✓ Reinforcing the participants' comments by sharing personal experiences which are relevant to the issues being discussed.



Checking Progress and Effectiveness

It is useful to have a mechanism in place for assessing training sessions to see if they have been properly prepared, well presented and effective. See the sample checklist below for ideas on how to assess your training sessions. Using a checklist such as the one below may help you to identify areas for improvement and will enable you to fine-tune your training approach.

CHECKLIST FOR EFFECTIVE TRAINING SESSIONS

Content

- Were training needs assessed prior to the session?
- Was the content relevant to the participants' work situations?

Organisation

- Was the session well linked to previous sessions?
- Did the session have a logical sequence?
- Did the trainer synthesise the discussion at the end of the session, and refer back to objectives?

Objectives

- Did the objectives indicate a measurable behaviour?
- Were the key points covered in the session relevant to the behavioural objectives?

Experiential Learning

- Was the session based on experience?
- Were participants given the opportunity to experience, reflect, conclude and apply?
- Did the participants draw valuable conclusions based on their discussion or exercise?
- Did the facilitator help the participants make a connection between the session and how they could apply it in the future?

Facilitation Techniques

- Did the trainer ask questions to promote discussion?
- Were the participants encouraged to ask questions?
- Did the trainer paraphrase and summarise to facilitate communication?
- Were instructions for group work adequate and clearly presented?
- Did the trainer use non verbal communication effectively?

Learning Climate

- Did the trainer engage the participants' interest in the subject matter from the start?
- Was there active participation?
- Was there an overall positive rapport between trainer and participants?
- Did the trainer provide feedback to participants with honesty and tact?
- Was the training environment a comfortable one for participants and free from embarrassment?
- Did the trainer select appropriate visual aids and use them to enhance presentations?
- Was the writing on the flipchart organised and legible?

Training Techniques

- Was the choice of techniques appropriate for attainment of objectives?
- Were the techniques appropriate for learning knowledge, attitudes or skills?
- Did the sequence of techniques lead to practical application of the subject matter?

Timing

- Was the trainer aware of time considerations and did s/he facilitate accordingly?
- Were participants made aware of time limits for small group activities?
- Was sufficient time allotted for mastery of the subject matter?

Evaluation

- Was the session evaluated?
- Was the evaluation documented on paper for future analysis and reference?

REFLECTION QUESTIONS

To what extent have your objectives described the desired behaviour of participants?

Which of the adult learning principles are typically observed in your organisation's training activities?

Which principles can be further developed to create more effective training?

What kinds of experiences have trainers used to stimulate learning during the organisation's training activities?

What is the role of the participant - is it active? Does it require the participant to reflect and draw conclusions through discussion?

Use the checklist to gauge how well your training activities have been implemented. Note areas where improvement is needed and make plans to revise your approach. There is more on monitoring your activities in Chapter 8 of this handbook.

Summary

This chapter covered a number of practical issues for designing effective training sessions. Training officers who know how to use the Principles of Adult Learning and the phases of the Experiential Learning Cycle will be able to work effectively with trainers to develop innovative and useful training sessions.

Adult learning principles should be used to ensure that training respects the participants' backgrounds and requirements for a satisfactory learning experience. Training sessions should build upon the participants' experiences and provide new experiences which lead to discussion, reflection and ultimately, improved job performance. When trainees participate actively in their learning, the lessons will stay with them longer and they will be better prepared to apply them in the field.

Training sessions should be based on strong objectives which require participants to act and demonstrate what they have learned. It is also important to monitor the progress of training to ensure that trainees are receiving the best training possible.

It is essential that training officers and trainers work well together to design and implement effective activities. The closer the relationship and the better the communication between the trainer and Training Officer, the better the training will be.



Chapter Seven

Conducting Training

As a training officer, you are responsible for the implementation of effective training activities within your organisation in order to raise performance and meet institutional goals. While you may not necessarily carry out the actual training sessions yourself, you should be familiar with the types and attributes of techniques used to make training innovative and effective. A good understanding of these techniques will help you to ensure that appropriate techniques are used to support your training activities.

Chapter 6 demonstrated that the Experiential Learning Cycle provides an ideal framework for designing training sessions. Within that framework, it is important to consider the types of training activities which may be used to help the participants address their needs and attain their objectives. This chapter will cover the kinds of techniques trainers can use to develop creative and participatory approaches to training. A variety of training techniques will be defined in this chapter and recommendations will be made concerning their use. The information will provide a useful and practical reference for both training officers and trainers.

Selecting Techniques

Certain training techniques are more efficient than others and better suited to specific learning needs. You should avoid focusing on any one technique to address all your training needs. Try using a combination of techniques throughout the learning cycle. To select appropriate techniques for your training, consider whether the learning will focus on knowledge (gaining information about something), skills (learning how to do something), and/or attitudes (reacting to situations with a different frame of mind). It is also wise to consider which techniques are most suitable to your audience, if the trainer is comfortable with them and if they can be conducted within your budget.

To convey knowledge, facts and information, consider:
readings, lectures, videos, TV, radio, field visits.

To teach new skills, consider:
demonstration or instruction, followed by practice with feedback to improve skills, learning by doing (trial and error), group problem solving, research and analysis through field visits and case studies.

To change attitudes and values, consider:
discussion, role playing, role modelling and case studies

OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO

Select appropriate techniques for training.

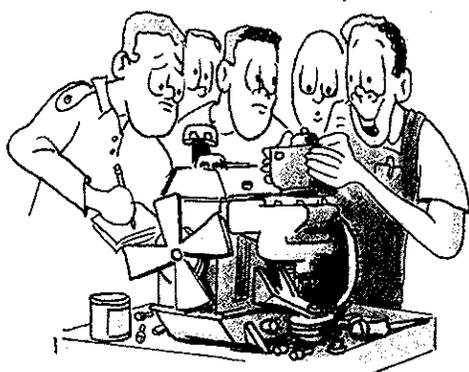
Apply a variety of techniques appropriate for the training environment.



When choosing training methods, try to select methods which the trainees will enjoy, learn from and feel comfortable with.



Now,
step #631 involves replacing the
carburettor like this...



Demonstration is ideal for teaching
detailed, step-by-step procedures.

Training Techniques

Consider the following techniques to support your training activities:

Demonstration

This is a form of presentation in which methods and procedures are demonstrated with trainees. Demonstrations are practical exercises which are useful for teaching step-by-step procedures and they provide good opportunities for trainees to test knowledge and skills. Following an initial demonstration, the trainer actively involves the trainees in trying the demonstration for themselves. While the trainees are testing their knowledge and skills, it is useful for the trainer and other participants to provide feedback.

Purposes of Demonstration. Use demonstration to:

- ✓ teach specific skills and techniques
- ✓ show step-by-step procedures which otherwise may be difficult for trainees to visualise
- ✓ show cause and effect by conducting the exercise
- ✓ provide the opportunity for trainees to test their skills

Steps for Conducting a Demonstration

- ① Prepare the materials required for the demonstration.
- ② Introduce the demonstration and its purpose.
- ③ Present the materials.
- ④ Demonstrate.
- ⑤ Repeat the demonstration, explaining each step carefully.
- ⑥ Invite the participants to ask questions.
- ⑦ Have the participants try the demonstration themselves.
- ⑧ Discuss how easy or difficult the demonstration was for the participants.
- ⑨ Identify the key lessons learned and summarise.

Considerations:

- ✓ demonstration requires advance planning and practice
- ✓ demonstration requires enough materials to enable everyone to participate
- ✓ demonstration may not be practical for large groups



Good demonstrations provide an
opportunity for trainees to test
their knowledge and skills.



Case Studies

Case studies are examples based on real experiences which are used to teach skills and change attitudes. They may be presented in verbal or written form and they are used to promote analysis and discussion on issues important to trainees. Case studies may be used to interest trainees in the issues and help them to relate those issues to their own work and the daily challenges they face. Case studies involve trainees by requiring them to think about the example and its implications. Since trainees may find it difficult to speak critically about their own work, case studies are ideal in that they provide neutral examples for review. Case studies make it possible for trainees to approach the issues critically and creatively.

Purposes of Case Studies. Use case studies to:

- ✓ critically discuss issues relevant to the trainees
- ✓ provide a secure opportunity to address difficult and controversial issues
- ✓ promote group discussion and group problem solving

Steps for Using Case Studies:

- ❶ Identify an example which is relevant to your training objectives and draft the case study.
- ❷ Prepare copies of the case for trainees to read.
- ❸ Introduce the case to the trainees.
- ❹ Give trainees time to familiarise themselves with the case.
- ❺ Present questions for discussion or a problem to be solved.
- ❻ Give trainees time to solve the problem(s).
- ❼ Encourage trainees to present their solutions/answers and discuss.
- ❽ Ask the trainees to describe lessons learned from the exercise.
- ❾ Ask them how the case is relevant to their own environments.
- ❿ Summarise.

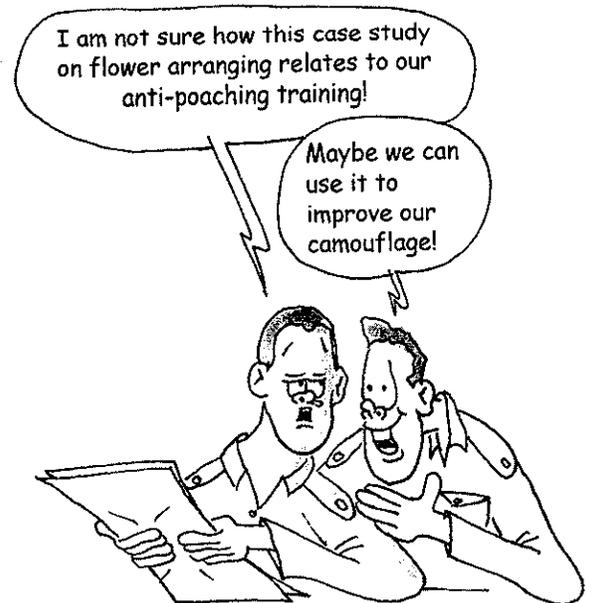
Considerations:

- ✓ the case must be practical and closely related to the trainees' experiences and training needs
- ✓ case studies require substantial preparation time if you plan to write them yourself
- ✓ discussion questions must be carefully designed to encourage reflection and produce practical results
- ✓ poorly designed or impractical case studies may distract trainees and raise false expectations



You may wish to have your peers or trainers review your case study to ensure that it is clear and easy to follow.

Make sure the case studies are practical and designed to address the immediate needs of the trainees.





Role play enables trainees to understand and appreciate the perspectives of others.

Role Play

A Role play is play acting used to solve problems. In role play, two or more individuals enact parts in a drama based on the training topic. The dramas are prepared by the trainer or a specialist and they are acted out by the trainees. Role play can be used to build knowledge, develop skills and change attitudes and it is stimulating and fun for most audiences. Trainees enjoy role plays because they break up the routine of a workshop, they are entertaining and they inspire participation. Role play provides participants with the opportunity to laugh about serious situations and challenging problems related to their work.

Purposes of Role Play. Use role play to:

- ✓ help change the attitudes of trainees
- ✓ enable people to see the consequences of their actions on others
- ✓ provide opportunity for participants to see how others might feel/ behave in given situations
- ✓ provide a safe environment in which participants can explore critical problems and discuss uncomfortable issues
- ✓ enable participants to explore alternative approaches to problem solving



But try to keep the trainees from getting carried away with their roles.

Steps for conducting role play:

- ① Develop the scenario for the role play.
- ② Write descriptions for each player's role (to be acted by trainees). Keep in mind that the dialogue of the actors should not be scripted.
- ③ Select 'actors' and prepare them so that they understand their roles and the scenario. Select a trainee to take notes on the activity to be used for discussion afterwards.
- ④ Introduce the scenario to the observers and start the play.
- ⑤ Observe.
- ⑥ Thank the actors and ask them how they felt about the play.
- ⑦ Encourage the trainees to share their reactions and observations.
- ⑧ Discuss
- ⑨ Ask the trainees to describe what they have learned and how it relates to their own work environment.
- ⑩ Identify key points and lessons learned and summarise

Considerations:

- ✓ the players must be comfortable in acting out their roles. The trainees should be familiar with each other before role play is attempted
- ✓ role play should be spontaneous. There should be no script to follow
- ✓ the roles must be well developed and properly communicated to the actors



Fishbowl Discussions

This technique involves small group discussion with observers. Well facilitated fishbowl discussions raise differing points of view on controversial issues. They are called fishbowl discussions because they are structured so that four people contribute to the discussion at a time while the others observe. The group of four are in the 'fishbowl'. Fishbowl discussions can be stimulating because the discussions are based on key issues and they are very participatory. Even if all trainees share similar points of view on the subject, fishbowl discussions enable them to be objective and explore other perspectives.

Purposes of Fishbowl Discussion. Use fishbowl discussions to:

- ✓ help trainees explore differing perspectives on key issues
- ✓ help trainees to respect and appreciate opposing viewpoints
- ✓ enhance problem solving, teamwork and communication skills

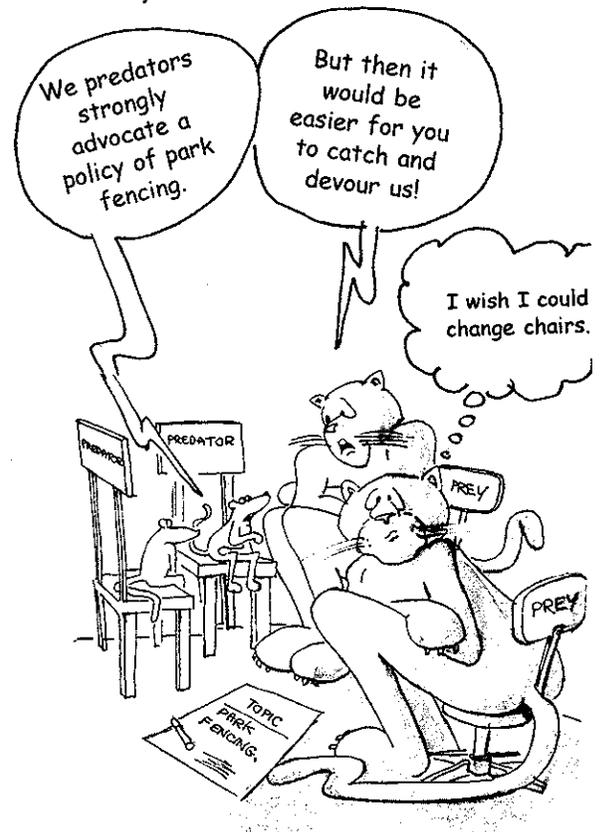
Steps for Facilitating Fishbowl Discussions:

- ① Identify an issue relevant to training which will generate controversy.
- ② Arrange four chairs, facing each other in the centre of the room.
- ③ Inform the trainees that they will engage in a discussion alternating as active participants and as observers.
- ④ Present the topic.
- ⑤ Recruit four volunteers to begin the discussion, and divide them into two pairs representing opposing points of view on the topic. Explain that they may need to play roles in order to present a particular point of view especially if the viewpoint is not their own.
- ⑥ Explain that anyone can join the discussion at any time by replacing one of the trainees in the fishbowl but they must continue to represent the perspective of the person they replace.
- ⑦ Begin the discussion and encourage participation. The facilitator should encourage observers to replace those in the fishbowl so that all the trainees have a chance to contribute to the debate.
- ⑧ After most of the points have been covered in the debate, conclude the discussion and thank the participants.
- ⑨ Encourage trainees to voice their reactions and observations.
- ⑩ Identify and summarise the key points.

Considerations:

- ✓ fishbowl discussions should be based on issues which are controversial and conducive to debate
- ✓ participants need to feel that it is 'safe' for them to take positions which may not be their own
- ✓ participants must be knowledgeable on the subject

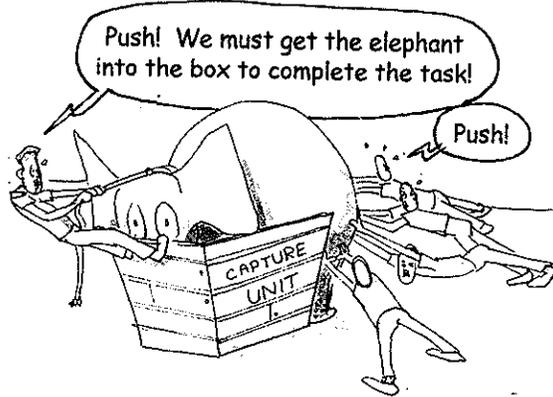
Like role play, fishbowl discussions provide an opportunity for trainees to explore differing perspectives on contentious issues. Trainees are required to argue the perspective of the chair they sit in.



Only four people may participate at any time, however. For someone to replace a person in the discussion circle, she or he must tap the shoulder one of the four participants discussing and then take his or her role in the discussion. The person being replaced returns to the observers' circle.



This method requires trainees to work together to address a task.



Group Problem Solving

The objective of group problem solving is for trainees to share their experiences and ideas in order to solve problems relevant to their work. Group problem solving occurs in small groups of four to seven trainees. The small group allows for active participation and each trainee is able to take control of his or her learning. As with any small group activity, everyone should be encouraged to participate. This may require close facilitation so that trainees are able to learn from each other during discussion.

Purposes of Group Problem Solving. Use this technique to:

- ✓ enable trainees to present their ideas in a small group setting
- ✓ enhance problem solving skills
- ✓ help trainees to learn from each other
- ✓ give participants a greater sense of responsibility in the learning process
- ✓ promote team work
- ✓ help participants clarify personal values

Steps for conducting a problem solving activity:

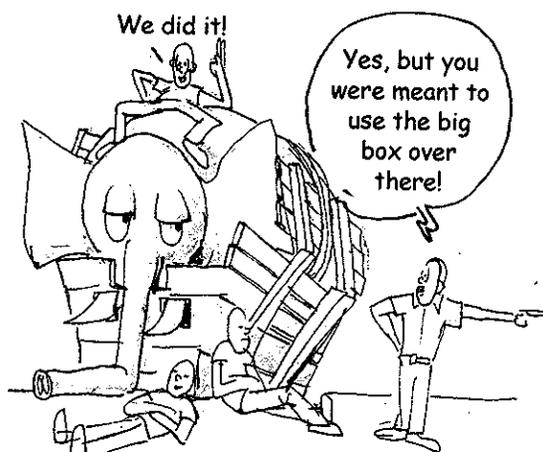
- ① Prepare a description of the problem to be discussed.
- ② Arrange the trainees in small groups.
- ③ Assign tasks regarding what should be discussed in the small group. Check to make sure that the tasks are understood.
- ④ Ask each group to designate a discussion facilitator, a recorder and a person to present the group's findings to the larger group.
- ⑤ Give the groups time to discuss the problem - this should not require the trainer's involvement unless the participants have questions for the trainer.
- ⑥ Ask each group to report its findings.
- ⑦ Identify themes common to the groups' presentations.
- ⑧ Encourage the trainees to share what they have learned from the exercise. Ask how they might use what they have learned on the job.
- ⑨ Summarise key issues and lessons learned.

Considerations:

- ✓ group tasks should be clearly communicated
- ✓ trainees should be kept aware of time considerations
- ✓ use questions to guide discussion
- ✓ trainees are less dependent on the trainer
- ✓ many people find it easier to express opinions in small groups



It leads to creative thinking and teamwork.



But it is important to make the task as clear as possible.



Presentation

Presentation is a technique in which the trainer or resource specialist conveys information, theories or principles directly to the trainees. There are many types of presentation ranging from straight lecture form to participant involvement through questions and discussion. Presentations depend more on the trainer for content than any other training technique. They are appropriate in cases where there is a need to cover a lot of material in a short time and they are especially useful with large groups. Presentations should be followed up with more participatory, active techniques to involve the trainees and make the material more memorable.

Purposes of Presentation. Use this technique to:

- ✓ introduce new subjects
- ✓ provide an overview or synthesis
- ✓ convey facts and statistics
- ✓ address large groups

Steps for Conducting Presentations

- 1 Prepare an outline for the presentation. Make sure it contains all of the key points to be covered in a logical sequence.
- 2 Prepare visual materials (flip charts, overhead transparencies, slides).
- 3 Introduce the topic and main points. Inform the participants what you intend to talk about.
- 4 Give your presentation and cover all the key points.
- 5 Summarise the key points you've made. Emphasise the points which the trainees may have found difficult.
- 6 Invite the participants to ask questions.

Considerations:

- ✓ presentation emphasises one-way communication
- ✓ it is not experiential in approach
- ✓ the participants' role is passive
- ✓ the lecturer needs special skills to be an effective presenter
- ✓ presentation is inappropriate for learning new skills
- ✓ presentation should be combined with more participatory and action based techniques

Remember- No single technique will address all of your training needs. Combine techniques based on the needs of your trainees and the topics to be addressed. Keep in mind that there are numerous techniques available and this list is not exhaustive.



Presentation is a good method for introducing new subjects and conveying facts.

However, presentation is not ideal for teaching skills.



Examples of Training Techniques in Use in Africa

The following pages contain two examples of training approaches developed in Africa.

'THE NEW SUPERVISOR' - Case Study from the African College of Wildlife Management, Mweka, Tanzania

Participant Instructions:

- 1) Read the case study and consider the questions
- 2) In a group of four or five, discuss the questions
- 3) Prepare to present your conclusions on a flipchart

Case study: You have been selected as a supervisor for a new conservation management unit. Previously, you were a warden without a supervisory role. Your skills at organizing the logistics of conservation management and your decisive style caught the attention of your bosses. Last Friday, you were notified by your immediate boss that your request for promotion (filed about 90 days ago) had been approved and would be effective beginning Monday.

It is Sunday afternoon. Tomorrow you will meet briefly with your boss, who will then announce your promotion to your group. You have worked as a peer with 20 to 25 people over the past four years. Two of them also applied for promotion to supervisor. One of the members of the group is your close friend and weekend sports and social companion. While you and he had a cordial working relationship, you have been mentally taking notes about how you would supervise the group differently. At least four members of the group were considered close friends of the former supervisor and appeared, on occasion, to receive preferential treatment.

As you sit in the comfort of your family room and contemplate tomorrow's challenges, how will you handle the following:

- 1) The meeting with your boss?
- 2) Your comments to the group when your promotion announcement is made?
- 3) Your first meeting with the group?
- 4) Your schedule of work for the day?



Case studies help trainees to think creatively about problems relating to their work. By addressing case studies, we can get new ideas and increased confidence to deal with similar issues in the workplace.

THE SAADANI GAME RESERVE: WORKING WITH THE COMMUNITY-

Group Problem Solving Exercise from the African College of African Wildlife Management, Mweka, Tanzania

Problems for consideration in group problem solving

Background. The 300-square-kilometre Saadani Game Reserve was established in 1968 as one of the Tanzania Wildlife Division projects. The eastern boundary of the reserve borders the Indian Ocean shoreline and Saadani village, inhabited by fishermen. There are two problems that the management of the reserve has been trying to solve:

Problem 1) When the agreement to establish the reserve was made, the villagers were left where they were (very close to the reserve), under a 'gentlemen's understanding' that they were not going to engage in any other major activity besides fishing. The reserve boundary passed behind the last village house.

As years passed, the villagers started having second thoughts and demanded land for farming, as fishing could not sustain their growing families any more. There are several factors that complicate this situation:

- The water well is in the reserve and therefore people enter the reserve to fetch water.
- The village primary school is also in the reserve.
- Firewood is being collected from the game reserve under supervision of the reserve authority.
- The population of the village has grown and because there is no area for expansion, the only alternative they see is to get part of the reserve back.

Several attempts have been made to solve the problem but it has become complicated and, at times, a political issue.

Problem 2) When the boundary was set, another mistake was made in the northeastern border of the reserve. Three houses were left inside the reserve, presumably with the understanding that they would not expand. At the moment there are 20 people in these households. These people are also demanding land in the reserve.

The Saadani Game Reserve authority is looking forward to getting ideas from this workshop on how these sensitive problems can be resolved. One of the measures we are now taking is to collect ideas from different viewpoints on how to deal with these problems. Some of those ideas should originate from this workshop.

Thank you in advance for the contribution you are about to give.

Project Manager, Saadani Game Reserve



REFLECTION QUESTIONS

What training techniques have trainers used in your organisation's training events?

Do your trainers use a variety of different techniques?

Why have certain techniques been effective?

How do your trainers use some techniques differently from the way they are described here?

Which techniques should your trainers introduce in future training sessions?

Summary

Resources for training are often scarce and most organisations prefer to spend their funds on the most practical and effective training possible. Several training techniques have been presented in this chapter to assist you in creating dynamic and participatory training sessions. The techniques have been tried and tested in training workshops throughout Africa and around the world.

Good techniques do not guarantee success. Trainers should be encouraged to take some risks to develop good techniques. Good trainers will study these techniques and adapt them for use in their situations, with their audiences. They will experiment with the techniques to discover how they can be used most effectively.

This chapter is the last in the section on implementing training activities. By now you should know how to work with trainers to implement effective and innovative training activities for your organisation. You should be able to develop participatory training sessions through the use of strong behavioural objectives, the Experiential Learning Cycle and the Theory of Adult Learning. You will be able to make your training concise and memorable through good facilitation and the use of appropriate training techniques.

Sections 1-3 provided guidance on the role of training within your organisation, planning of training, preparation, and techniques for conducting effective activities to improve your organisation's performance. Now you are prepared to address monitoring and evaluation issues and forward planning in the last section of the handbook.



Section Four

LOOKING BACK TO MOVE FORWARD

THIS SECTION INCLUDES

**Chapter 8 Looking Back
&
Chapter 9 Moving Forward**

The fourth and final section of 'What's Your Role?' is about understanding and facing the challenges of the future. Although it appears at the end, the material in these last chapters supports the beginning of a new era for training in your organisation. For the training unit to become an emerging force for positive change requires a look back at what has happened. Action requires reflection. Chapter 8 presents methods for monitoring and evaluation. The purpose of Chapter 9 is to help the training unit determine what that future work will be like, based on an assessment of its current status and a vision for its future.

Chapter Eight

Looking Back

There are a variety of people who must be kept up-to-date on the progress of training activities and their impact upon performance within your organisation. These may include senior level managers, supervisors, training participants, trainers, collaborating agencies and donor organisations. Monitoring and evaluating keeps stakeholders up-to-date and provides them with the information required for good decision making. This chapter will explain how monitoring and evaluation can be used as a tool to improve your programmes, win donor confidence and strengthen your organisation.

Although training officers may not be directly involved in data collection, they should nevertheless be aware of how monitoring and evaluation can be used to affect decision making and change within the organisation. The Training Officer should also know how information is collected, how it is assessed, how it may be useful and to whom. He or she should be familiar with monitoring tools and skilled at selecting appropriate evaluation methods. As the Training Officer's skills build up, he or she may become more directly involved in data collection. This chapter covers all of these points and helps the Training Officer have a greater impact on planning and institutional development.

Monitoring

Monitoring is the ongoing process of checking to see whether training activities are going as planned. Monitoring tools are used to collect the information required to assess progress. Monitoring requires a commitment to collect information *regularly*, to *use* that information for programme improvement, and to *report* the information to the proper authorities.

Monitoring differs from evaluation in that:

MONITORING IS:

A continuous and systematic process

Carried out by staff

Based on the collection of information on a regular basis

Used to make incremental adjustments in the programme or project.

WHILE EVALUATION IS:

An event occurring usually at the middle and/or end of the project.

Conducted by staff or people outside the organisation

Based on analysis of information which is collected periodically.

Used to make major changes in programme direction and to design new projects.

The purposes of monitoring in training are threefold: 1) to learn how participants are reacting to training events; 2) to track individual employee participation in training activities; and, 3) to gauge the progress of training activities in relation to the training plan.

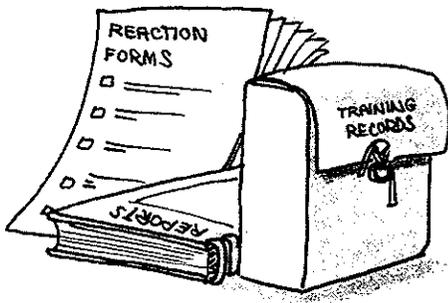
OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO

Measure training's progress in achieving individual and organisational objectives for performance improvement.

Use data from monitoring and evaluation for decision making.





Many of the methods described in the evaluation section of this chapter can also be used as monitoring tools.



Basic Monitoring Tools

There are three basic monitoring tools which should be useful to support your programmes:

- ① Participant reaction forms.
- ② Training records.
- ③ Workshop reports.

Participant reaction forms gauge the progress of training events in terms of participant satisfaction, while training records serve to justify the selection of participants. Workshop reports help the training organisers build on the successes of previous workshops, replicating what was good and improving those areas where there were problems.

Participant Reaction Forms. By gauging how participants react to training sessions, trainers are able to improve their approaches and keep the training relevant to learning needs. The purpose of the participant reaction form is to collect feedback on the thoughts of participants once a training session has been completed for the day. It enables trainers to adjust training plans on a daily basis to ensure that training remains appropriate and guided by the needs of the trainees. Reaction forms can address issues relating to the usefulness of training activities and help to assess the importance and relevance of topic areas. The forms can also be used to gauge whether participants enjoyed the training techniques used, and if they think the trainer was effective.

Discussions about training activities can also be used as a means of monitoring progress. For example, you might start every workshop day with an analysis of the previous day. The analysis may be prepared by a small group of participants, or you might simply ask the participants for their candid remarks about how they think the training is going.

E SAMPLE OF A PARTICIPANT REACTION FORM - from a Community Based Conservation Workshop, College of African Wildlife Management (CAWM) and Resource Development Management Associates (REDMA), Tanzania

Here is an designed to be completed at the end of a workshop day.

Daily Learning Experiences

Day:

- 1) What have been the major training experiences for the day?
- 2) What, of your major experiences, are you committed to transfer to your working environment?
- 3) What have been the major learning constraints for the day?

Training Records. Training records are records maintained to track information regarding the history of job positions, education and training for each employee within your organisation. They provide a useful reference for both supervisors (to make suggestions for further training or promotions) and training officers (to help determine an individual's need for training). See the sample record below.

SAMPLE TRAINING RECORD		coding
Name: Victor Otieno		
Date of birth: Feb 7, 1965		
Current position/job title: National Park Warden		
Formal qualifications on entry: High School Diploma		
Pre-service training received on entry: Paramilitary training courses and Administrative courses.		
Positions held	Dates	
Junior Warden	1984-88	
Assistant Warden	1989-92	
Warden	Present	
Promotions received:	dates	
Assistant Warden	1989	
Assistant Conservator	1992	
Internal in-service training received Formal	1986-1988	
Diploma in Wildlife Management		
Short courses	3 weeks 1991	
Paramilitary- repeated course		
Workshops	Sept 1995	
Integrating research and management workshop		
Monitoring and surveillance techniques training course	Feb 1996	
Other in-service training - Under supervision of Warden during 1st 3 months as Assistant Warden		
Record last updated	March 1996	

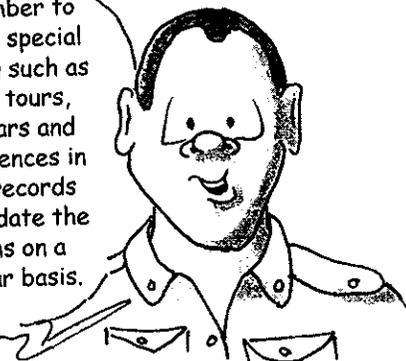
A record of training is often included in personnel files. Try to create records for every member of your organisation.

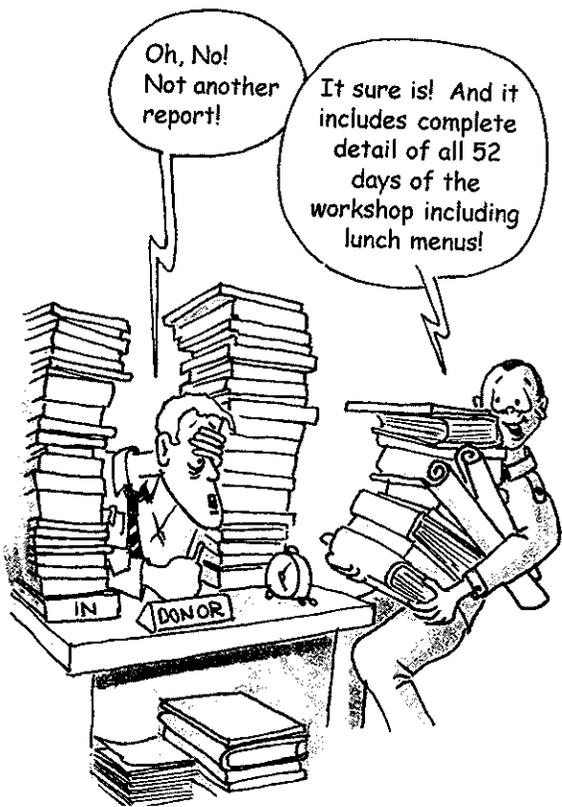


In-service training includes training organised by your organisation which takes place during the employee's term of service. These training programmes usually last no longer than 6 consecutive months.



Remember to include special training such as study tours, seminars and conferences in your records and update the forms on a regular basis.





Senior management and donors may not have the time to read lengthy reports. Provide them with versions of the report which are brief and concise.

Be sure to indicate how the workshop fits within your training plan or programme. Explain how it addresses immediate needs.



Workshop Reports. Workshop reports are used to record information about aspects of training workshops which may be of interest to managers, participants, donors and other stakeholders. The emphasis of each report is determined by its target audience. For example, if the primary target audience for the workshop report is the participants themselves, the focus should be on the content of the workshop including key findings and the material covered in each session. If the report is mostly intended for senior management and donors, the focus should be more on profiles of the participants, participants' reactions, background information, and a summary of the quality of the training process.

Sample Format for Workshop Reports. Although report formats vary depending on their target audience, most include the following information.

Executive Summary

This introduces the reader to the report and provides an overview of its contents and key findings. Everything that is mentioned in the executive summary will be described in further detail in the report itself. The executive summary should provide sufficient information about the workshop for someone who isn't likely to read the report in its entirety but is still interested in the outcome of the workshop.

Table of Contents

This lists all the major sections of the report.

Background

This provides background information to set the context for the workshop. It should include descriptions of preparatory activities, how the trainers were selected, sources of training materials, and site selection.

Course Goal and Objectives

The report should feature clear statements of the overall workshop goal and the overall objectives. The specific behavioural objectives for each session should be included in the *Proceedings* section of the report. For more information on how to formulate goals and objectives, please refer to Chapter 5.

Methodology

This is a description of the training methodology used during the workshop. It should answer questions such as: Was the trainer's overall approach a participatory one? What was the role of the participants during the workshop?

Workshop Proceedings

The report should have an account of the proceedings of the workshop including the behavioural objectives for each session, and a narrative explaining what actually happened. If the proceedings are detailed enough, trainers should be able to use the information to create similar training activities.

Outputs and Conclusions

This section of the report describes tangible outputs resulting from the workshop such as action plans, skills gained, policies created, etc. This section should also include the conclusions made by organisers and trainers based on training activity evaluations.

Participant Evaluation Findings

These may include evaluations carried out during the workshop, including ratings of sessions and participants' comments. Include a summary of participants' evaluation in a form analysing the ratings and comments.

Recommendations (by the consultant or by the organiser)

The personnel conducting the workshop should be required to provide recommendations on how the workshop could be improved. The organiser should specify what type of recommendations the consultant should consider in his or her report. Recommendations may include suggested follow-up activities.

Appendices may include:

- workshop schedule
- sample outputs
- participant list

Hints for Producing Good Training Reports

Plan the report before the workshop begins. Set the format and begin writing the report at the outset of the workshop. Continue to add elements to the report as the workshop progresses, and by the time the workshop is over, your report will be half done!

Make the report a priority. You know that you will need to write the report so *plan* to allow yourself time to do so after the workshop. Producing a timely report is as important as conducting a good training activity. The longer you take to finalise the report, the more you risk weakening the impact of the training workshop.

Include a cover letter. When you send the report to senior management and donor agencies, include a cover letter which indicates how important their support has been and what follow-up you expect from the workshop.

Say! This is interesting! This report from last August recommends that our pilots receive a lot more training on basic flight proficiency!

That is interesting.

Wow!

Timely dissemination of reports is important. Late reports may not be of much use.

And check reports carefully for mistakes!

While monitoring is conducted on a regular basis, evaluation takes place at special times to facilitate wise decision making.

Track the progress of your training activities against your training plan. Consider having a training committee meet on a regular basis to review progress and make recommendations. Re-work your training schedule and plan as required.

Focus the report on the audience. Consider creating special versions of the report for each specific target audience. Many senior managers and donor representatives may not have enough time to read your report cover to cover! Consider making condensed versions for them. Don't try to impress them with extra pages - just give them what you think they can use and let them know in a cover letter that more information is available upon request.

Evaluation

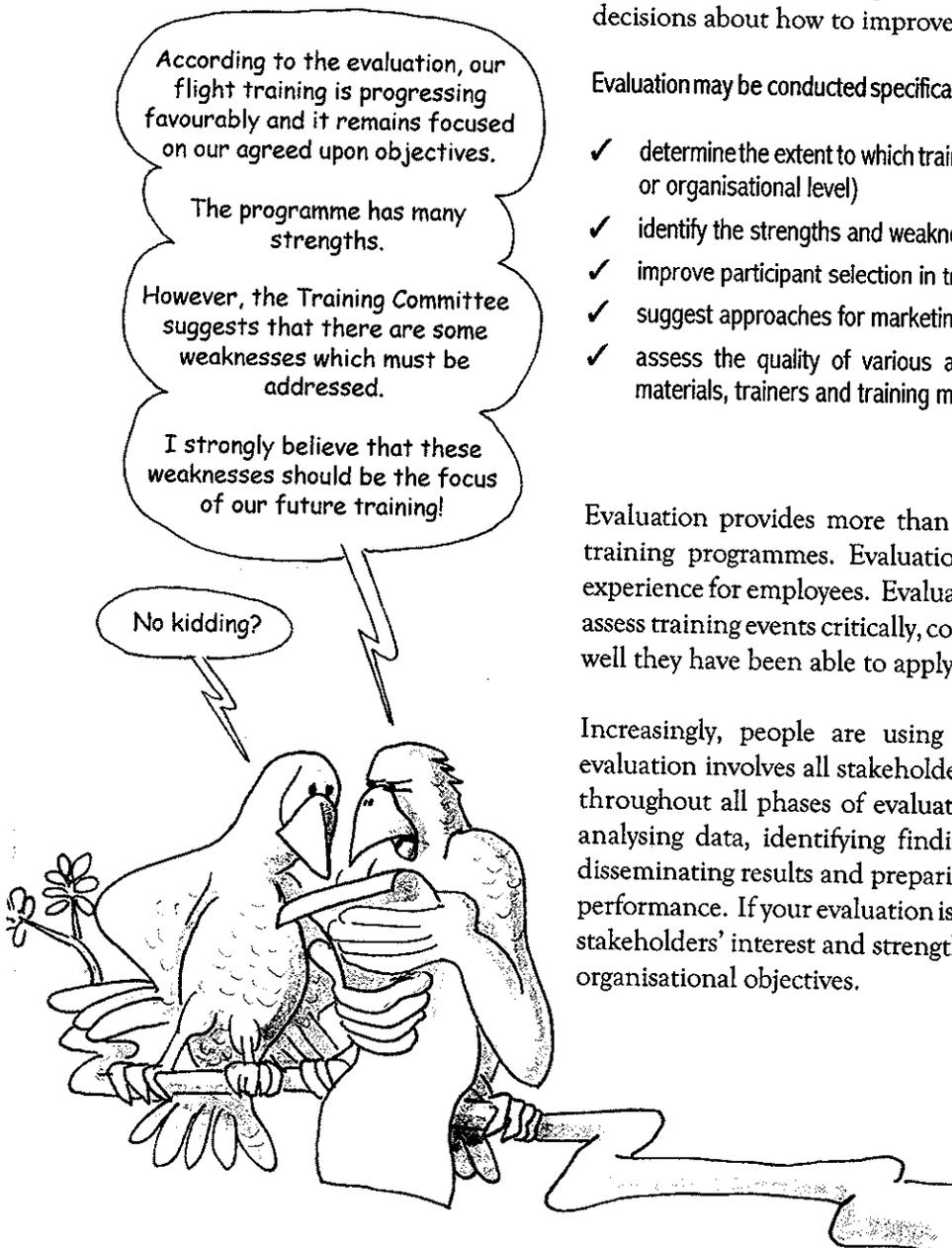
Evaluation is an activity through which information is collected and analyzed in order to judge how well programmes are achieving their objectives. Evaluation helps training officers and senior managers to make informed decisions about how to improve training programmes.

Evaluation may be conducted specifically to:

- ✓ determine the extent to which training is accomplishing its objectives (at the individual or organisational level)
- ✓ identify the strengths and weaknesses of training systems
- ✓ improve participant selection in training activities
- ✓ suggest approaches for marketing training activities to other potential participants
- ✓ assess the quality of various aspects of training, including choice of content, materials, trainers and training methodology

Evaluation provides more than just information on the effectiveness of training programmes. Evaluation can serve as a supplemental learning experience for employees. Evaluation discussions encourage participants to assess training events critically, consider the lessons learned, and assess how well they have been able to apply new skills and knowledge.

Increasingly, people are using participatory evaluation. Participatory evaluation involves all stakeholders in the process and typically takes place throughout all phases of evaluation: planning and design, gathering and analysing data, identifying findings, conclusions and recommendations, disseminating results and preparing an action plan to improve programme performance. If your evaluation is participatory, it will help you to widen the stakeholders' interest and strengthen links between training and achieving organisational objectives.



Final Evaluation Forms. The most common evaluation tool for assessing training events is the final evaluation form (the form participants complete at the conclusion of a training event). Final evaluation forms are the easiest way to assess training activities, but they may not provide a *complete* assessment of the training. Results from participant reaction forms may be biased towards sessions which the participants enjoyed most. Care should be taken to use these forms in combination with other techniques to double check findings and provide additional detail.



The Four Levels of Evaluation

Training evaluation systems may be approached in several different ways but most theoretical models recommend four levels of evaluation including:

- ❶ Participants' *reaction* to the training (Did they like it?).
- ❷ Participants' *learning* (Did they learn?).
- ❸ Participants' ability to *perform better* (Have they applied anything they learned to their work?).
- ❹ Participants' ability to have greater *impact* through improved performance (Has training made any difference at other levels?).

Consider these four levels when designing and conducting your evaluations.

❶ Participants' reaction to the training (Did they like it?)

As we know from the Principles of Adult Learning, trainees learn best when they enjoy their learning experience and they are involved in shaping their training. Subsequently, it is important for training officers and trainers to know which activities trainees respond to best. Results from this level of evaluation can be used to ensure that approaches are used which trainees like and to which they respond well.

Action. It is important to measure participants' reactions. Find out what they thought of the training event, including the methodology, materials (handouts), trainer's effectiveness, organisation, facilities, course content and so on. Participant reaction can be measured formally using daily evaluation forms (to monitor a training activity) and final evaluation forms (to determine their overall level of satisfaction). The evaluation section of most training reports includes participants' reactions, since this information is readily available during training activities.

These reactions may not, however, indicate what the participants *learned*. You should be careful to differentiate between training which is well received and training which is well received *and* effective.



A high rating for a session does not necessarily mean that the training was effective in transferring knowledge and skills to the participants.

Ways of measuring reactions:

- questionnaires (daily and final evaluation forms)
- interviews
- focus groups



Create your own form to meet your evaluation needs. People like to select the middle of the scale when rating. Use even numbers to avoid this problem.



Make it simple, clear and easy to read and grade.



Sample Final Evaluation Form from the College of African Wildlife Management and Resource Development Management Associates (REDMA), Tanzania

Date: / /

Please circle the number that corresponds with your answer to the questions:

1) Did the choice of workshop topics meet your expectations?
 Not at all 1---2---3---4 Completely

2) Were you satisfied with the way the workshop was conducted?
 Not at all 1---2---3---4 Completely

3) Which topics should have been given:
 More time? Less time?

4) How did you find the level of content?
 Too high? Just about right? Too low?

5) Were the training techniques useful?

6) What experiences are you committed to transferring to your working situation/environment?

7) Were there any learning constraints/difficulties?

② Participants' learning (Did they learn anything?)

Measuring learning gives you an indication of the extent to which participants have developed knowledge, skills and attitudes as a result of your training event. It is more difficult to measure learning than it is to measure reaction. This measurement is not used as often but it is important to the trainer. By measuring learning, you can determine which approaches and activities are truly effective in transferring knowledge, building skills and changing attitudes.

Ways of measuring learning:

- written or oral test
- practical
- observation with checklist

⑥ Participants' ability to perform better (Have they been able to apply knowledge and skills?)

Although training is intended to increase performance, this level of evaluation is often neglected. Performance within workshop environments is easier to measure because the trainer is able to monitor the situation closely and draw links between behaviour and training. To measure performance in the workplace requires supervisors with commitment to consider the progress of trainees and facilitate development of skills on the job. Although this is part of a supervisor's job in principle, it is often neglected or insufficiently documented.

Action: Help supervisors to monitor performance on a regular basis and encourage them to discuss performance issues as a follow-up to training activities.

If supervisors are not able to assist fully with evaluation, consider using trainers or evaluation specialists to conduct your performance evaluations. Keep in mind that this option requires resources which may not be readily available.

Ways of measuring post-training performance

- survey with a questionnaire
- survey through interviews
- observation
- record review
- focus groups

⑦ Participants' ability to have greater impact through improved performance. (Has the training made a significant difference at other levels?)

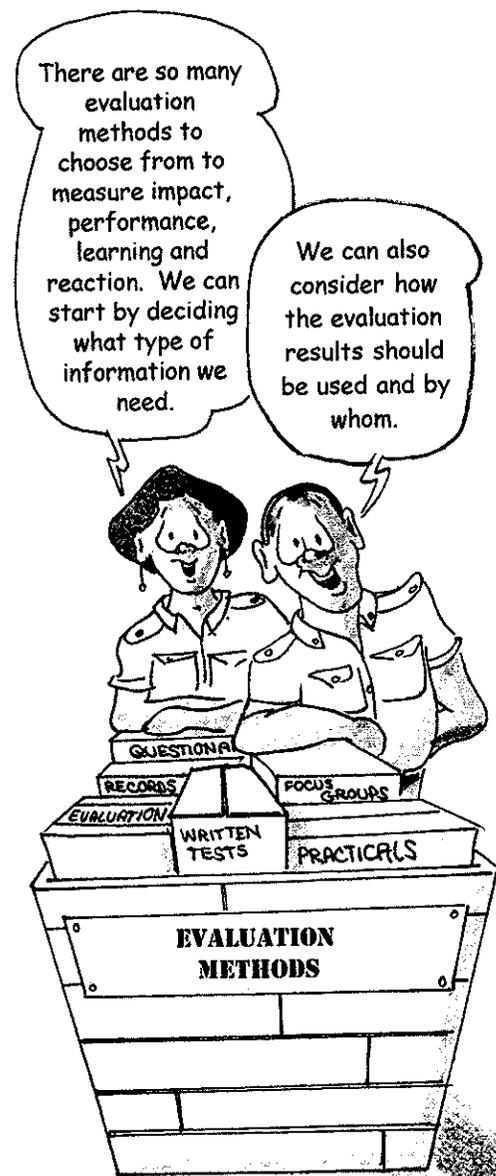
This is another important aspect of evaluation which is often neglected. An employee may affect the performance of people under his or her supervision (or sometimes even above) as a result of putting into effect skills learned through training. The ways to measure impact are similar to ⑥ above. Remember to include people who the employee works with when gauging impact and post-training performance.

Selecting Evaluation Methods

There are a number of factors to consider when you choose evaluation methods. Think first of what type of information you require and how you intend to use it. Consider who will be the ultimate target audience for the information and what they are most interested in knowing. The following is a brief description of several evaluation methods and considerations for their use.

To gauge performance, give questionnaires to trainees and supervisors.

Post-training performance, or 'impact' may be difficult to measure but the results help you to determine if training is improving your organisation's effectiveness.



Questionnaires. *Questionnaires* are forms consisting of a series of questions which require written answers. The questions can be short-answer (yes/no, rating scale) or open-ended (for recording an opinion).

Considerations for using questionnaires:

- ✓ questionnaires are easy to administer to a large number of people
- ✓ questionnaires may be used to reach people in remote areas
- ✓ respondents can fill them out when they have the opportunity and they don't have to schedule special times to complete the evaluation
- ✓ they are inexpensive to produce and use
- ✓ responses can be easily standardised with multiple choice or yes/no questions
- ✓ contributors can complete evaluations without divulging their identity
- ✓ questionnaires are impersonal
- ✓ many people aren't used to filling them out and find them difficult
- ✓ written questions can be misinterpreted
- ✓ they may not address issues which are important to the respondents
- ✓ they are difficult to follow up with further questions
- ✓ non-response (people don't always return them)
- ✓ degrees of literacy may differ among cadres



Try not to put too much information on your questionnaires. Make them simple and easy to understand.

Written tests may be used effectively to gauge knowledge before and after training.

Written Tests. *Written tests* are documents with questions designed to measure a participant's knowledge, attitude and behaviour towards the topic of the training. The tests may be developed by the trainer, the Training Officer or members of the Training Committee and they may be administered at the beginning of the workshop (as a *pre-test*) for baseline information. They may also be administered at the end of the workshop (as a *post-test*) to measure how much participants have learned. Questions may be multiple choice, rating, yes/no or open-ended. Tests differ from questionnaires in that they gauge what has been learned while questionnaires focus on feedback and information.

Considerations for using written tests

- ✓ they can be used as a learning tool
- ✓ they are low cost
- ✓ they are easy to administer
- ✓ processing can be done quickly
- ✓ it is difficult to link knowledge level with performance on the job
- ✓ participants might feel threatened by tests
- ✓ many people are not used to completing written tests
- ✓ possible cultural bias



Practicals. *Practicals* are exercises in which participants are required to test their new knowledge and skills in a real (or almost real) context. Practical can take place during field visits or through a simulation, and therefore they can serve as a learning activity at the same time. Practical puts the participant in the context of 'the real world' (the work place). Subsequently, practicals are able to bring out behaviours and performance issues that other, more passive methods do not.

Considerations for using practicals:

- ✓ they take a lot of time and resources
- ✓ it may be difficult to have enough trainers to provide individual attention to participants
- ✓ they require careful logistics and planning
- ✓ they provide a learning experience while evaluating learning

Interviews. *Interviews* involve dialogue between one who asks questions and another who responds to them. The discussion is face-to-face (or over the telephone) and the interviewer takes notes on the conversation and/or records it. Interviews are less restricted than questionnaires and more personable. Since the discussion occurs between two people, responses can be more in-depth than written responses usually are, allowing the interviewer to follow up one question with another if a response is not clear the first time.

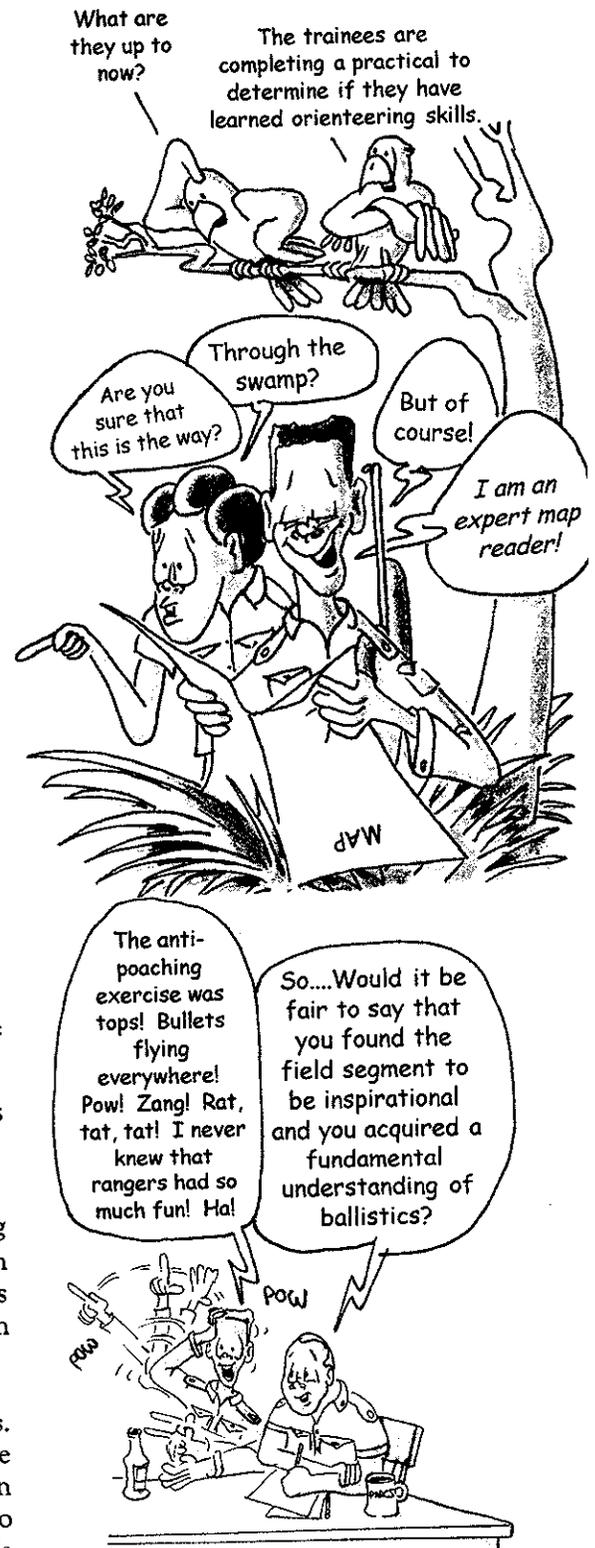
Considerations for using interviews:

- ✓ interviews cover only one person at a time and are time-consuming
- ✓ because responses are usually longer (more in-depth and qualitative), analysis is more difficult
- ✓ interviews are more costly and difficult where long distance travel is required, or if telephone communication is not possible
- ✓ candidness of the answers may depend on the interviewer and the type of questions asked

Focus Groups. *Focus groups* are structured discussions among approximately 5-12 people who are invited to contribute opinions on a given topic. The facilitator contributes questions for exploring the topic, probes issues, and assists with clarification (but does not otherwise voice an opinion in the discussion).

With focus groups, people don't feel as interrogated as in interviews. Because they take the form of a discussion, focus groups are more enjoyable and participatory. Since discussion occurs in a group, the facilitator can observe the way people react to what others in the group say. Compared to interviews, the facilitator gets information from a greater number of people in less time. Focus groups are generally inexpensive to conduct.

Depending on the questions to be asked and the results required, focus groups may consist of the trainees, their colleagues, or supervisors.



Interviews are not as easy as they seem and they involve only one person at a time. Keep the questions simple and be prepared to paraphrase answers.



With observation, the evaluator has little control over what is evaluated. You can't predict the situation and you may be surprised by the results



Considerations for using focus groups:

- ✓ people's opinions may be influenced by others in the group
- ✓ you can't cover many questions, since discussion is time consuming
- ✓ the discussions must be recorded in some way
- ✓ focus groups require careful planning so that everyone shows up on time and an appropriate room/space is available
- ✓ it is difficult to summarise the information
- ✓ an experienced facilitator is required

Observation. *Observation* is a data collection method in which one or more persons watch an activity and record what they see. Information collected through observation is first-hand, not reported by someone else and it is based on performance in the context of 'the real world' (the work place). Like practicals, observations of people at work are very realistic. Unexpected performance issues may arise and the observer should be open to anything that presents itself, not simply questions on paper.

Considerations for using observation:

- ✓ it takes a lot of time and resources
- ✓ it is difficult to include a large number of people
- ✓ the presence of an observer may influence the person's performance
- ✓ trained observers may be necessary
- ✓ the quality of the observation is highly dependent on the observer's skills
- ✓ reliability is usually low--two or more observers rarely notice the same things in the same way, but it can be improved with practice

Record Review. *Record review* is an examination of written documents related to training. Relevant documents may include reports, training records, performance appraisals, registers, letters, and memos. With this method, information is systematically collected over time, involving a large number of people. Record review may be more cost-effective than other methods, and depending on the documentation system in the organisation, the evaluator may have access to a lot of information. This method may be good for use with audiences which feel threatened by evaluation since it involves little direct interaction.

Considerations for using record review:

- ✓ records may not be up to date
- ✓ documentation systems may not be considered important by all on a regular basis
- ✓ the evaluation is indirect and there is no personal contact
- ✓ the information may not be complete enough to finalise the evaluation

See the quick reference table below to assist you in selecting the most appropriate method for your evaluation.

Methods	These methods should be used to:			
	Gauge Reaction	Assess Learning	Gauge Performance	Assess Results and impact
Questionnaire	yes	no	yes	no
Written test	no	yes	no	no
Practical	no	yes	no	no
Interview	yes	no	yes	yes
Focus groups	yes	no	yes	yes
Observation	no	no	yes	no
Record review	no	no	yes	yes

Once the information has been collected and analysed, evaluation data may be presented in terms of findings (the raw data), conclusions (what the raw data tell us), and recommendations (what actions the evaluator suggests the training unit or organisation should take).

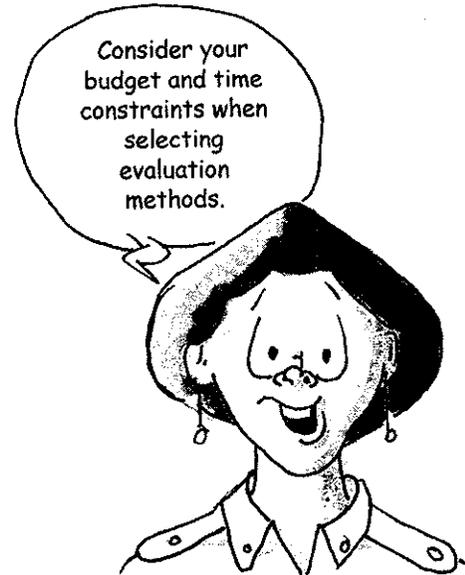
Evaluation and Decision Making

Ultimately, evaluation results should be used to help a variety of stakeholders to make informed decisions concerning training and organisational development. A number of different stakeholders should have access to evaluation results to use in their decision making.

Stakeholders. The following list shows how or when key stakeholders should have access to evaluation results:

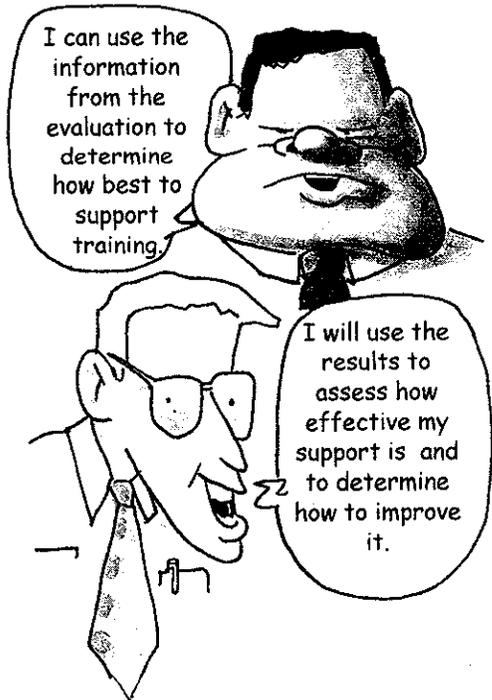
Senior and mid-level managers: This level of stakeholder should have access to evaluation results to support regular in-house meetings, debriefing presentations, and individual meetings with the Training Officer. Results of the evaluation may be used to design new projects or to revise existing projects. Information may be provided in the form of quarterly reports, internal memos, or the written evaluation report itself.

Donor agencies: Donor agencies require evaluation information to assess how their funds are used and to support field visits. Evaluation results can also help donors to decide on your proposals. Include excerpts of evaluations in proposals and annual reports or submit the evaluation itself. You may use evaluation results to market your organisation and gain new or increased support from the donor agency.



Remember to consider the type of information you need and how you intend to use it. Consider using a combination of methods to ensure that the results are fair and accurate.

Involve stakeholders in order to strengthen your training programme and create a sense of ownership for the programme among management and staff.





Training participants: Training participants will benefit from evaluation results in that it gives feedback on the impact of the course and the performance of the trainees. They may find reports, internal memos or the written evaluation report itself useful.

REFLECTION QUESTIONS

- What information do you currently use to make decisions about training?
- Is there a regular system for collecting information related to training?
- Do trainers and managers follow the system?
- Which methods for monitoring and evaluation have you tried?
- Which methods are most effective?
- Which methods could be introduced as regular monitoring activities?
- Which methods could be applied during the next training evaluation?
- Are there similarities between the way training is evaluated and the way training needs are identified?

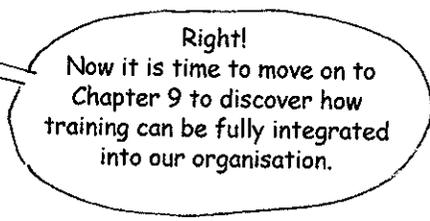
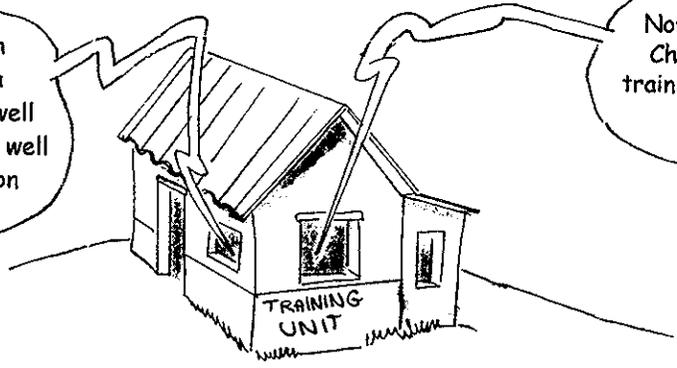
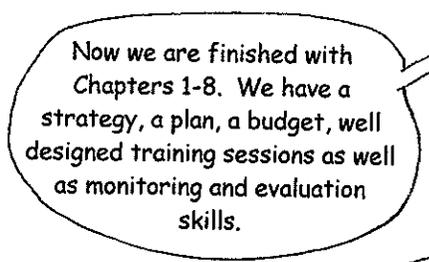
Summary

The Experiential Learning Cycle tells us that, by reflecting on our actions, we learn from our experiences (Chapters 1 and 6). As you develop effective training in your organisation you must reflect upon your experiences in order to determine how to improve training and make a greater impact upon your organisation. Monitoring and evaluation activities provide information for the Training Officer and others to make decisions on how to develop training on a continual basis. Monitoring and evaluation also help training officers prove that training *does* raise performance levels among individuals and within the organisation as a whole.

Monitoring is an ongoing process of checking to see whether training activities are going as planned. Monitoring uses tools to collect information which tell the Training Officer how well things are going. If information is collected *regularly*, it can be used for programme improvement, and to *report* to stakeholders and decision-makers. Some basic tools for monitoring are participant reaction forms, training records and training reports.

Evaluation is different from monitoring because it involves collecting and analysing data all at once, rather than on a regular basis, and it is used to judge how well a programme is achieving (or has achieved) its objectives. It is usually more in-depth than monitoring and leads to decision making on a broader scale. A number of evaluation methods are available to gauge: 1) participant reaction; 2) participant learning; 3) performance change; and 4) whether improved performance has had any kind of impact.

The next chapter will help training officers look at the overall role of training in their organisation. It pulls together the concepts and approaches presented so far, to present a frame of reference for the Training Officer to evaluate the status of training and how it may evolve further to improve overall performance.



Chapter Nine

Moving Forward

The information presented in the first eight chapters of this guide is very extensive. A number of subjects have been covered from adult learning theory and the Experiential Learning Cycle, to funding, working with trainers and evaluation of training activities. The task of putting all this information together and applying it to your work situation may appear daunting. It often helps to analyse the current state of your training programme before planning ahead. It is then possible to develop a vision for the future, and a work plan for addressing the most critical and challenging issues.

Making a decision without established guidelines is like embarking on a long journey without a map and saying 'it doesn't matter which way I go.' You will obviously end up somewhere, but without a plan, you may not reach your goals and you risk wasting time and valuable resources. This chapter describes how to create a unit level plan to develop the role of training within your organisation. On the following pages a framework is provided which shows progressive phases through which most organisations move in developing the role of training. This framework should assist you in putting your current situation and your vision for the future into context. The chapter is primarily designed for training officers but it may also be useful for managers and heads of organisations.

Although the responsibility for raising performance within your organisation is a formidable challenge, it is important to remember that you are not alone! Institutionalisation of training requires commitment and support from many stakeholders, beginning with those at the top. You may seek guidance through planned, participatory discussions of the training unit's needs, priorities and resources in order to develop the role of training within your organisation. This chapter includes information on how to be an effective advocate for training to help you involve senior level stakeholders.

Strategic Planning

Strategic planning is a phrase that every one seems to be using these days. What does it mean? Strategic planning at the organisational level involves a series of steps which allow a structured analysis and creative thinking. The key steps are:

- 1 To develop a mission statement.
- 2 To undertake an analysis of strengths, weaknesses, opportunities and threats (SWOT).
- 3 To prioritize your SWOT analysis, to define the key/critical issues and to generate options.
- 4 To develop strategic actions.
- 5 To develop a strategy for implementation.

OBJECTIVES

THIS CHAPTER WILL ASSIST YOU TO

Assess the status of training in the organisation.

Identify critical issues for the training unit.

Envision the future of training in the organisation.

Develop a work plan to advance training towards its mission in the organisation.





Start with an idea of where you want to go as a unit and keep sight of your mission, goals and objectives.

We will need to give our colleagues good knowledge, skills and attitudes to improve their performance



Remember that training has a primary role in the achievement of organisational goals and objectives.



Remember that the task will be easier if you can develop a strong mission or goal which you can all agree upon.

These steps lead your organisation to develop a strategy for achieving its objectives. Ideally your organisation will have developed a strategic plan and in doing this will have identified training as integral to achieving its objectives. As we don't live in an ideal world it may be that your organisation doesn't have a plan and you have the challenging task of showing your senior managers that training is not just an activity in and of itself, but that it needs to be a key mechanism for achieving objectives. The approach you could take is to make an assessment of the current state of your training programme and do some strategic planning at your own department or unit level. You can then use this as a basis for discussions with senior managers and show the advantages of adopting strategic planning. This chapter takes this approach.

Strategic Thinking at the Unit Level

The first step in developing a vision for the role of training in your organisation is to take a strategic approach. Analyse the present, envision the future, and develop a plan to address critical issues. Act strategically to:

- ① Identify critical issues that the training unit needs to address in order to develop the role of training in the organisation.
- ② Develop a mission statement that articulates the purpose of the training unit.
- ③ Create a work plan to guide the training unit into the future.

In addition to the basic outputs listed above, your strategic planning process should yield some other important outcomes including:

- ✓ an improved understanding of how training officers can help organisations be more effective
- ✓ a more defined role for the training unit and the Training Officer in the organisation
- ✓ better communication within the training unit and with other stakeholders

Getting Started on Planning. Strategic planning can only take place once the Training Officer and other stakeholders agree on the current status of training. Discussion and analysis with people from both within and outside of the organisation are required to achieve this step.

You need to be clear about the goal of your organisation to set the context of your discussions and analysis. Although your organisation may not have a 'mission statement' there will be statutes which explain what the organisation was set up to do. Use these as a starting point and make sure all stakeholders are familiar with them.

For a thorough analysis of your unit's present status, consider information from a wide variety of sources. Be open to the opinions of others (whether or not you share their point of view). Greater awareness leads to being more responsive and cost-effective. Try questionnaires or SWOT analysis to involve stakeholders and get the information you need.

Stakeholders are people who are significantly influenced by or have an influence on the implementation of a strategy or project. Stakeholders may include representatives of government agencies, collaborating institutions, donors, community leaders and members, volunteers, clients, and the organisation's governing body and staff.

Information Gathering. To get information from stakeholders, you can distribute written questionnaires, conduct individual interviews, or have group discussions (focus group interviews). The objective should be to get opinions of others regarding the training unit's strengths and weaknesses, not to convince them that one form of training or another is necessary.

SWOT. Another way of learning from stakeholders is to invite them to participate in a SWOT Analysis. SWOT is an abbreviation for Strengths, Weaknesses, Opportunities, and Threats. A SWOT analysis is an in-depth, focused, and frank group discussion involving stakeholders (including staff members). Some people consider it a kind of brainstorming exercise, where everyone's ideas are open to consideration. The SWOT analysis should provide information about the training unit, according to the following grid:

SWOT	INTERNAL Within the training unit	EXTERNAL Outside the training unit
Positive Characteristics	Strengths Things that work well within the training unit	Opportunities Areas where there is potential for growth.
Negative Characteristics	Weakness Things that do not work well within the training unit	Threats External factors which threaten the training unit's effectiveness.

It is important to establish where you stand before moving forward.



To get an accurate picture of your current status, involve key stakeholders in the information gathering stage.



SWOT involves brainstorming. The facilitator should act as a guide and resist unduly influencing the discussions.



Threats include issues which have a negative impact but may be beyond the control of the participants.



When conducting SWOT analysis, facilitators ask questions of the participants, discuss and record their answers. Questions may include:

To identify Strengths, enquire:

- ❶ How does the training unit assist the organisation ?
- ❷ What does the unit do well?
- ❸ What aspects of the training unit make it strong?
- ❹ What problems has the training unit been able to resolve effectively?

To identify Weaknesses, ask:

- ❶ What aspects of the training unit are inefficient?
- ❷ What would you like to change about the training unit?
- ❸ What are some recurrent problems within the unit?

To identify Opportunities, ask:

- ❶ What outside factors may help the unit to become more effective?

To identify Threats, ask:

- ❶ What's happening outside the training unit that has a negative influence on the unit and the organisation?

To assess opportunities and threats, consider these issues:

- ✓ the need for training within the organisation to achieve objectives
- ✓ the demand for training within the organisation
- ✓ recognition of training's function in the organisation
- ✓ others' perceptions of the training unit
- ✓ leadership in the organisation
- ✓ organisational funding
- ✓ the extent to which the organisation allocates funding to training activities
- ✓ ability of the organisation to recruit/assign enough competent staff to the training unit
- ✓ the training unit's access to information and materials to become more effective
- ✓ other organisations and/or consultants that can help the training units capacity
- ✓ donor interest in training activities
- ✓ training opportunities at the local, national, and international levels
- ✓ changes in available technology

Discussion of these issues will bring out other considerations which should be included in the SWOT analysis. By the end of the analysis, the training unit should have a list of all strengths, weaknesses, opportunities and threats relevant to the unit's effectiveness. This will become the basis for identifying critical issues for the training unit.

A basic SWOT analysis can be done in half a day while a more thorough SWOT analysis could take an entire day of a workshop or retreat. The Training Officer shouldn't be discouraged if the SWOT analysis sounds too complicated ~ he or she should make it a simple process of analysis. The overriding objective is to bring stakeholders together to review the current training situation.

EXAMPLE: SWOT ANALYSIS RESULTS- *The Mpumalanga Parks Board Staff Development Unit, South Africa*

Strengths identified

- Motivated staff of the staff development division who are prepared to undergo hardship in the field to upgrade field personnel
- Flexibility in scheduling courses
- Staff members eager to learn and improve their skills
- Staff development is an essential part of the capacity building and empowerment of staff in the organisation

Weaknesses identified

- High costs of staff development
- Lack of administrative support to maintain staff development records
- Lack of promotional opportunities for staff of the staff development division
- Lack of expertise in human resource management

Opportunities identified

- A booming demand for staff development (nationally and internationally) that could generate income to subsidise own staff development costs
- Potential exists to become the leading nature conservation organisation in southern Africa in the field of conservation-related staff development
- Potential exists to produce highly committed, motivated, skilled staff members in nature conservation in Mpumalanga
- Potential exists to contribute significantly to upgrading the ability of staff, in nature conservation and related industries, to protect endangered species and other fauna and flora in protected areas.

Threats identified

- Costs of staff development will increase in future
- Lack of support by senior management for the objectives of the staff development plan
- Negative perception of in-service staff development as being inferior
- Lack of feedback regarding staff performance by management and supervisors
- Lack of ownership and support by staff of the staff development plan

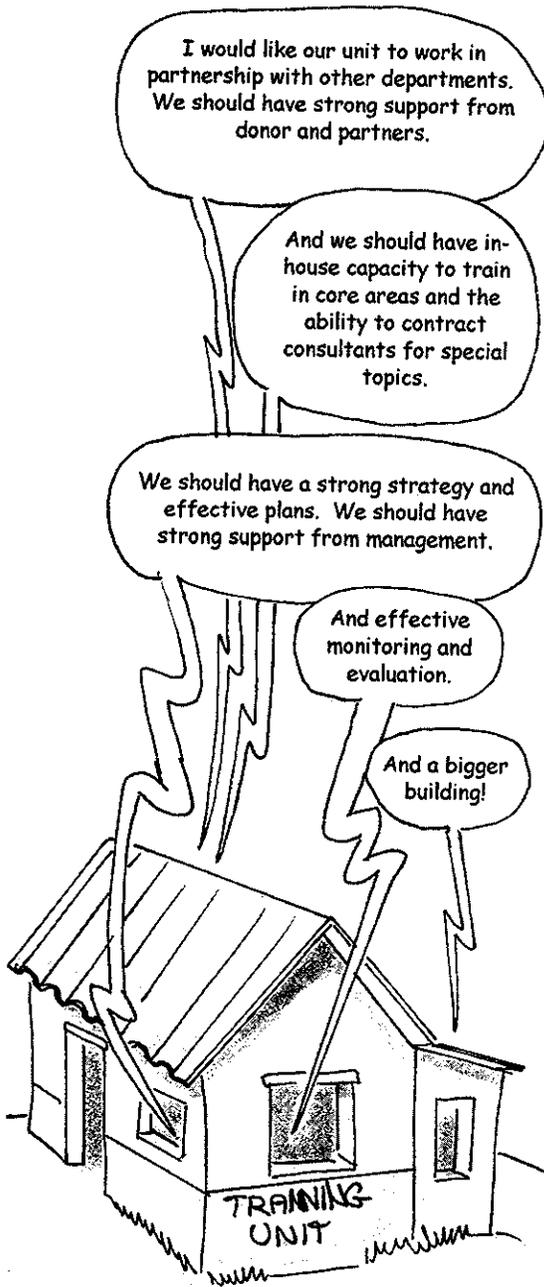
It's a good idea to record the information in Strength, Weakness, Opportunity and Threat categories across a wall. This makes it easier for the facilitator to guide the group in linking issues and drawing conclusions.

The facilitator should be familiar with the issues and skilled at participatory techniques. He or she should check with the group to make sure that the points being recorded are correct.

The SWOT should highlight critical issues for the unit to address. At the end of the exercise, participants should have a clear picture of the status of the unit and ideas for improvement.



Work together to develop a common vision for the unit's future.



The mission statement defines the purpose and functions of the training unit. It is a precise statement describing the unit's clients, its products and services, and the way in which they are delivered.

Once you have completed your SWOT analysis you will have generated lots of information. The next steps are to:

- ❶ Envision the future and develop a mission statement for your unit and choose the key issues that seem to you to be of critical importance.
- ❷ Check to see if these issues fall into groups or themes.
- ❸ Define your key issues precisely and phrase them as objectives to be achieved.
- ❹ Identify ways in which opportunities can be changed into actions.
- ❺ Identify potential solutions to weaknesses and ways to mitigate threats.
- ❻ Develop several alternative ways to address each issue to ensure that objectives will be achieved. These are your strategic options.
- ❼ Choose between your options, develop an integrated set of strategic actions under a number of themes, and allocate responsibilities and deadlines against each action item.
- ❽ Schedule a review and follow-up.

You will then have a strategic action plan or work plan.

Envisioning the Future

It is important to create a vision of how you wish training to improve in the future and what role it should have in your organisation. A simple exercise is to imagine what your organisation will be like with an effective, well-functioning training unit and describe it in writing. This vision will assist you to encourage the unit's development by describing to others how things could be in the future.

All members of the training unit should work together towards realising this vision for the future. Such teamwork can be supported through the development of a common mission statement. A mission statement is a long-term statement of purpose for the training unit conveying the vision in words.

Mission Statement

The mission statement defines what the training unit must do. More specifically, a mission is a precise statement of purpose which describes the customers, the products/services, and how they are delivered. It is the training unit's reason for being. The mission statement also gives a clear explanation of where you wish to take the training unit in the future.

Examples of organisational mission statements:

E MISSION STATEMENT: *The College of African Wildlife Management, Mweka, Tanzania*

The mission of the college is to provide high standards of relevant professional and technical training to meet the needs of African wildlife organisations for qualified and competent management staff.

The skills and knowledge required by these professional staff include the effective management of:

- wildlife
- biodiversity
- the balance between conservation, economics, and the role of local communities
- tourism
- human and financial resources

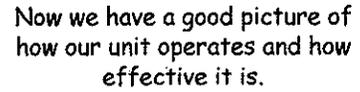
The College will respond to these changing needs by:

- providing the most practical wildlife and biodiversity management training
- maintaining strong links with its clients to ensure continued relevance of the training provided
- offering a range of courses and seminars meeting professional and technical requirements at different levels
- using highly appropriate training technology, delivery, and assessment methods to ensure effective learning
- offering research and consultancy services
- attracting and retaining a leading team of professional staff
- securing the future of the College by generating and attracting financial support

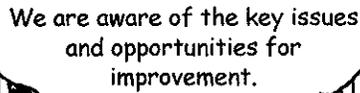
E MISSION STATEMENT: *Southern Africa Wildlife College, South Africa*

The mission of the College is to provide protected area managers from southern Africa with the motivation and relevant skills to manage their areas and associated wildlife populations sustainably, and in cooperation with local communities.

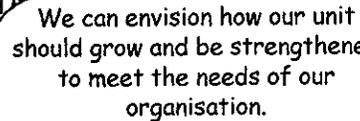
Following the analysis, it is important to clarify and prioritize the issues. Link the most critical issues to action the unit can take to enhance its role and help your organisation to raise performance levels.



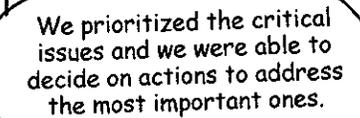
Now we have a good picture of how our unit operates and how effective it is.



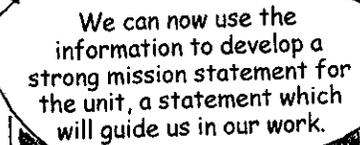
We are aware of the key issues and opportunities for improvement.



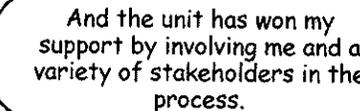
We can envision how our unit should grow and be strengthened to meet the needs of our organisation.



We prioritized the critical issues and we were able to decide on actions to address the most important ones.



We can now use the information to develop a strong mission statement for the unit, a statement which will guide us in our work.



And the unit has won my support by involving me and a variety of stakeholders in the process.

Invite a variety of stakeholders to participate in mission statement development. Invite them to review draft statements and offer feedback. By involving others, you will create a sense of ownership for the mission and you will gain support from your colleagues.

Writing Mission Statements. Mission statements should not be written by one person alone. The mission statement will be better designed and it will receive more support if key stakeholders are involved in its development. Stakeholders may include staff, administrators, consultant trainers and others affected by the unit's activities.

Bring together the unit's most important stakeholders and discuss its purpose. Ask stakeholders to describe what the purpose of the unit should be. Use the mission statement criteria below to shape your draft statements of purpose. Discuss the drafts and agree on the one statement which best describes the unit's mission. The essence of the mission statement should reflect what staff and stakeholders feel about the training unit's work. It should be simple, concise, reaffirming and motivational, especially to those working with the training unit. Invite feedback and ask others from both inside and outside the organisation to review the statement.

Mission Statement Characteristics. Mission statements should:

- ✓ answer the question, 'why does the training unit exist?'
- ✓ be meaningful to the training unit staff and the unit's stakeholders
- ✓ be clear and concise (no longer than a few sentences)

Following time for reflection, review and feedback, you should be ready to finalise your mission statement. This will require approval from the organisation's governing board and/or from the senior management. Once the statement has been approved, it should be included on all of the unit's publications and documents, including external reports, brochures and proposals.

Critical Issues

The critical issues for the training unit come from the SWOT analysis. The Training Officer should determine which of the strengths, weaknesses, opportunities and threats are most important to the unit's future. Through discussion of issues with stakeholders, the Training Officer should determine four or five of the most important. These are the organisation's critical issues, and the Training Officer will need to address them in a work plan (described later in this chapter).

Specific issues discussed in the SWOT analysis may be grouped around one critical issue. For example, if internal organisational weaknesses include weak senior level support, training conducted without an understanding of the organisation's policy on training, and inconsistency in approaches to addressing training needs, the critical issue could be that the training unit has not committed enough time to working with senior management to adopt a policy on the role of training in the organisation.



Mission statements should be practical and simple. Avoid writing statements which commit you to addressing issues which are beyond your control.

Work Plan Development

Once the Training Officer feels that there is a shared purpose for the unit within the organisation, he or she can review the unit's critical issues in order to begin addressing them with a plan. For each critical issue, there should be an objective. For example, if fundraising for training activities is lacking in the unit, an objective might be: 'To generate an additional 20% of funding for training activities within two years.'

The next step is to take each of the issues you have identified and devise three or four ways of addressing each issue so the objective will be achieved. To continue our fundraising example you might develop the following three options:

- 1 increase the annual budget request within the organisation
- 2 seek to secure additional funding from external sources
- 3 allow external participants to attend training courses on a fee paying basis

You now need to choose which options to pursue. In some cases you may reject some, and in others you may decide to adopt them all. In the above example you would probably take up the second and maybe the third option and would also need to assess how likely it is that your organisation will give you more funds and then decide whether to include the first one.

Now you need to integrate, co-ordinate and sequence your options. You should refer back to your SWOT analysis and see whether the key issues fall into themes. One example that was given earlier was the theme of the need for senior management support. If this theme is selected as an example, the next step would be to look at the options you have generated. Can some of these be combined into actions? Are there some which must be done first? Slowly you can build up a series of themes and a sequence of actions that need to be undertaken.

The last step is to allocate the people responsible for each activity and the date for achievement of each activity. You now have a strategic action or work plan for your unit.

Involving Others in Planning. As with all efforts to effect organisational change, the development of the role of training requires support and participation from throughout your organisation. If you decide to do a strategic plan for your unit you will need to involve a variety of colleagues. If you are just working on your training programme, support from each level of the organisation will take a different form.

Listen closely because I worked hard on this workplan.
First I took our most critical issue.

*Not enough
Warthog on
the menu*

Then I set objectives..

*Obtain
30% more
Warthog*

Then I devised and grouped approaches.

*Improved stalking
Faster chases
Better reconnaissance*

Then I assigned responsibilities

*Mary - Research
Catherine- Stalking
Florence - Chasing*

And here is the schedule. Any questions?

Yes. Can't we just have cabbage?

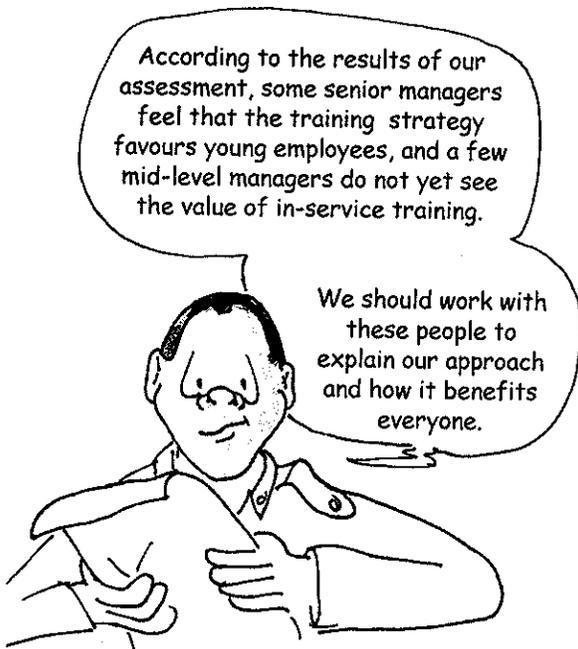




So, after my SWOT, do you think I should address HRD through fishbowl discussions, role playing or focus groups? And of course, I'll use andragogy!

Andrew Goggi? Who's he?

Keep in mind that senior managers may have little background or formal training in human resource development. Their involvement in training should focus on long-term issues rather than day-to-day training needs. One long-term issue, for example, may be to convince senior management to allocate funds to implement the training plan.



According to the results of our assessment, some senior managers feel that the training strategy favours young employees, and a few mid-level managers do not yet see the value of in-service training.

We should work with these people to explain our approach and how it benefits everyone.

Senior management should show support through formulation of good policies and by making resources available. They should also encourage others at lower levels to provide support and participate fully. Other levels of management need to show support through their participation in all phases of the training process, including needs assessments, training plan design, discussions with participants selected for training, follow-up support and evaluation. Employees at all levels should value training as an integral component in human resource development and they should show their support through participation in different phases of the training process.

Support must begin with senior management. Without their commitment to developing a strong training ethic and effective training systems, progress made toward improved training will not be sustainable. To gain their support, the Training Officer should know what to expect from senior management and how best to approach them.

It is worth the time to analyse your support network within the organisation and plan carefully regarding how to influence others and increase support for training. The following steps provide guidance in building better relationships and support for training.

- ① *Determine what kind of support is needed from each managerial level.*
Identify at least three levels of managers, including the most senior level, and determine what to expect from each level in order to develop and implement your in-service training system.
- ② *Assess the extent to which they support in-service training.*
Design your approach to address each level of management as a group, keeping in mind that individuals working each level of management may show support in different ways. Obtain information by organising meetings with representative selections of managers to discuss what they think about in-service training in general. You could also develop a questionnaire for them to fill out or interview them on an individual basis. Once their views are clear, it is easier to analyse their support.
- ③ *Analyse support from managers.*
If lack of support for in-service training is a problem, there may be several reasons. A manager may say, for example, that he or she is extremely busy. If, however, a manager says that he or she is too busy to worry about training, the Training Officer might wonder if training is a priority for that person. It may be that he or she doesn't understand how training others can improve things all around. You should determine what managers believe in order to influence their thoughts about training. To do this, identify the most prevalent reasons for lack of support at each level in the organisation - these will determine the action to take.
- ④ *Plan how to address the key concerns.*
Consider making changes in a practical, incremental manner to achieve your vision. The Training Officer should arrange meetings with key individuals in the organisation and bring people together in order to discuss priority training issues.



How to be a Good Advocate for Training:

Gaining support for training requires good advocacy skills. In meeting with high-level government officials, for example, it is important to make the best use of one's time during the meeting. The following are tips that should give the meeting greater impact.

- ✓ Research first - be well-prepared to state your case fully and clearly. Provide relevant materials ahead of time.
- ✓ Let the other person know the purpose of your meeting ahead of time and keep the objectives for your meeting specific and clear.
- ✓ Don't overload your agenda - focus on one or two priority issues and agree on how much time you have for the meeting.
- ✓ Choose your words carefully. Listen carefully and be patient.
- ✓ Avoid being confrontational - don't put the person on the defensive. Rather than saying, "You didn't read my report," try saying, "You'll remember, from reading my report, that..."
- ✓ Identify issues where you both agree and build from there.
- ✓ Anticipate all possible reactions - practice ahead of time how you will deal with any reaction.
- ✓ Don't go back to the same points - always raise new points.
- ✓ Show outcomes of what you are proposing - help the person see what will happen as a result of your initiative.
- ✓ Focus on the issue - not the person.
- ✓ Use mass appeal - point out how many people will appreciate what you propose. (Would it get positive media coverage?)
- ✓ Paraphrase what the other person says to make sure you understand the meaning - the other will appreciate hearing that you understand her/his point.
- ✓ Know when to stop - sometimes a little ground gained is better than none at all.

Be a good advocate for training

Plan ahead and be prepared. Choose the right moment for your meetings.

Be concise and to the point.

Be tactful and show that you understand their perspective on the issues.

Focus on the positive outcomes of your activities.

And be aware of body language.



Training committees can be used to ensure that a variety of stakeholders contribute to the enhancement of training on a regular basis.

Often, I run into problems with my training programme which I can't solve on my own. My supervisor advises me on most issues but I rely on the training committee to provide expertise in key areas such as fund raising and policy-making. Through the committee, a variety of decision-makers become involved in the development of the organisation and we are able to set training priorities together.



Support Through Training Committees. Unless key stakeholders are systematically encouraged to participate in the planning and implementation of training, their support may not recur on a regular basis. One approach used in a number of countries is to designate a training committee. A training committee is a group of individuals from different levels of the organisation with some expertise or decision making power relating to training activities. It meets on a regular basis to review issues related to in-service training, such as policy, budgets, and systems, and to discuss future directions for the role of training in the organisation. The committee may play an advisory role or it may have decision making power as a group.

Case Study: The Role of Training Committees- PARCS project staff in Uganda

The purpose of a Training Committee is to develop a training strategy, programme and plan, and budgets for training activities. In addition, it establishes the post of Training Officer for the organisation and develops the Training Officer's job description.

The committee meets once a month or as needed. The committee's members may include the following:

- ✓ the Deputy Director
- ✓ the Administrative Officer
- ✓ the Chief Financial Advisor
- ✓ an officer from a donor or an international partner organisation providing major funding
- ✓ the Training Officer
- ✓ two wardens

The Wardens are elected by the other Wardens during an annual meeting. Criteria for selection of the wardens on the committee include having a background in education and working at the level of Warden-in-charge.

In one instance the following issues were discussed during the committee's first meeting:

- ✓ update on training activities
- ✓ the need to develop a training plan
- ✓ the need for training records
- ✓ training budgets: the need to prioritize training need,
- ✓ identify funding sources, and ensure accountability
- ✓ policy for out-of-pocket allowances provided to seminar and workshop participants, and for transport reimbursement
- ✓ criteria for selection of staff to attend training

Is Your Work Plan Working?

An important part of your work plan consists of the review activities which you have included. These reviews help you see how much has been achieved and identify areas where some additional effort is required. Just how much progress have you made in developing the role of training in your organisation?

Case Study: Institutionalising Training in Congo

One of the objectives of the PARCS project in Congo was to begin a process to ensure the continuation of the training function beyond the life span of the project itself. The project strategy included regular meetings with the Minister of Water and Forests to discuss project achievements and potential developments. The project staff needed broader support from within the government, so mid-way through the project they called together five deciders (senior level administrators with decision making authority in the ministry) to create greater awareness of the project. Another meeting was convened to include those five administrators as well as leaders of other projects within the Ministry, all of whom could benefit from knowledge of the PARCS project activities.

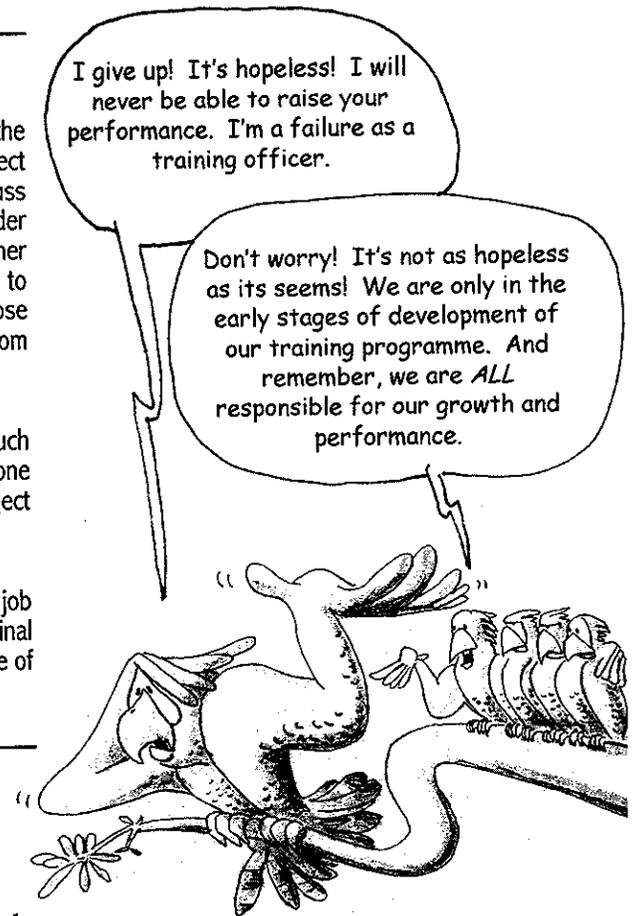
As a result of these meetings, senior management and other stakeholders gained a much better awareness of PARCS' role in developing training. They now recognise that one person has responsibilities for all training activities within the ministry (the PARCS project prompted the creation of this position).

Another important issue discussed during these meetings concerned standardising the job descriptions for Protected Area Managers to focus on core activities. Although a final decision had not yet been made, the discussions themselves elevated the importance of training issues to a much higher level than before.

A Model For Training Unit Development

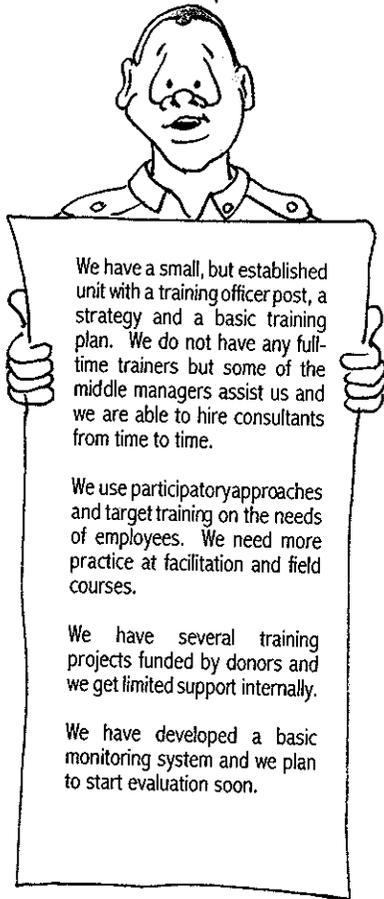
The following model will guide you in identifying where your unit stands. It will also help you to envision how the role of training may be developed further. Use the model to assess progress and set targets for the future.

Refer to the model to determine where your unit stands in terms of its development and what action must be taken to move on to the next stage of development. Keep in mind that the role of training may not be equally developed for each of the factors in the chart.



The stages of development for your unit may differ from those shown here. Use these summaries to guide you in developing an accurate description of your own unit.

Here's a brief description of our own training unit. In many ways we are in Stage 2 but in some aspects, we are in Stages 1 or 3.



Use the chart on the following pages to assess how developed your training capacity is and determine how you can improve in the future.

Stages of Development.

Below are descriptions of the three main stages of development used in the model, ranging from the early stages of development to the ultimate unit role. Each stage describes the unit's development in terms of:

- ✓ relationship between the unit and the organisation as a whole
- ✓ staff development
- ✓ financial and staff resources
- ✓ monitoring and evaluation
- ✓ planning
- ✓ design of activities and methodology used
- ✓ materials
- ✓ support from management and stakeholders

Review the descriptions to determine which stage is most similar to your situation:

Stage ①. This represents an early stage in training development within the organisation, where there is a lot of potential for applying the concepts and methods presented in this book. Organisations in this stage have just begun to address the role of training. Organisations that find themselves in Stage 1 for many of the categories presented in the growth charts, will need to plan carefully and take small steps at first. Organisations at Stage 1 should be realistic about what they can accomplish with scarce resources, focusing on those areas that show the greatest potential for success. Gaining organisational support may be a long-term issue for organisations which are at Stage 1 and it may be useful for the Training Officer to focus his or her work at a practical level, such as implementing a successful training workshop, in order to show donors and senior level managers the impact training can have on performance.

Stage ②. This is an intermediate stage in the development of the function of training. Organisations in this stage have made a concerted effort to develop and improve the role of training but progress may be irregular and limited in some aspects. Training officers who believe their units to be at Stage 2 can develop support from stakeholders based on the successes made to date. It is important for organisations at Stage 2 to focus on the positive and build upon those areas which are strongest. In the process, many of the weaknesses will also be addressed.

Stage ③ For many organisations, this stage represents the ultimate role for training and human resource development. In this case, training is an integral and important part of the organisation and is extremely effective in raising performance. In the short-term, it may be unrealistic to try to reach Stage 3 in every category. Nevertheless, Stage 3 may provide targets for development in the long-term. Some organisations will find that they have reached Stage 3 in one area, while in other areas they are still in Stages 1 or 2. The organisation will grow incrementally, with progress in some areas and no progress (or even regression) in other areas.

A Model For Training Unit Development

Categories	Stage 1	Stage 2	Stage 3
Relationship of training unit to the organisation as a whole	The training unit doesn't exist	The training unit exists but it doesn't have a strong influence on the rest of the organisation	The training unit is well established and acts as a consultant and partner to other units and managers. It provides expertise which contributes to improved organisational effectiveness
Staff development in the organisation	<p>No human resource development strategy exists. Training events and participant selection occur on an <i>ad hoc</i> basis.</p> <p>Performance appraisal is not common within the organisation.</p> <p>Selection for training is not based on needs or lack of performance.</p>	<p>Management provides general guidelines for staff development, but they are not formally enforced.</p> <p>Needs assessments are conducted and supervisors play a role in staff development, but with weak links to training activities.</p> <p>Performance appraisals are established but skills development is not considered.</p>	<p>A human resource development strategy exists and is respected by training unit and management.</p> <p>Strong links exist among needs assessment, training activities and follow-up supervision.</p> <p>Employees participate in setting performance objectives during appraisal; skills development is part of performance appraisal.</p>
Resources for training	Stage 1	Stage 2	Stage 3
Financial resources for training	<p>The organisation does not have a training budget.</p> <p>All training activities are funded on an <i>ad hoc</i> basis by donor agencies.</p> <p>Funding comes from only one source.</p>	<p>Training activities have been budgeted but they are subject to highly centralised decision-making.</p> <p>Funds become available for training occasionally from within and outside the organisation.</p> <p>Funding is more diversified, but the majority is from a single outside source.</p> <p>Funding for training is short term.</p>	<p>Decentralised decision-making occurs for allocation of funds within training budget.</p> <p>Diverse, stable funding has been developed from sources within and outside the organisation.</p> <p>Funding is available to implement long-term planning and training strategies.</p>

Staff resources for training	All training is conducted by trainers from outside the organisation	A training officer exists but has insufficient decision making power and insufficient staff	The training unit is well staffed and draws resources from other areas of the organisation and from consultants and collaborating organisations
Decision-making Processes for Training	Stage 1	Stage 2	Stage 3
Monitoring	<p>No monitoring plans are in place</p> <p>Information collection and record keeping is haphazard and inconsistent</p> <p>Records do not contribute to planning</p>	<p>A monitoring plan exists but is not respected by all managers</p> <p>Involvement of mid-level managers in developing monitoring system is insufficient</p> <p>Monitoring systems are not fully developed</p>	<p>The monitoring plan is a high priority of managers; they were consulted in the design process</p> <p>Training activities are well documented with standardised records and report forms</p> <p>The monitoring system is computerised</p> <p>Routine reports are generated, distributed and discussed in planning meetings</p>
Evaluation	Training activities are not evaluated except when required by a donor	<p>Training evaluation is planned but is limited to participant reaction during workshops</p> <p>Impact of training is not determined</p>	<p>Evaluation activities take place before (for baseline data), during, and as follow-up to a training event</p> <p>Planning is based on past evaluation findings</p>
Planning	<p>Little or no planning or control from within the organisation</p> <p>Planning is donor-driven, not necessarily based on training needs</p> <p>No involvement of stakeholders are not involved in planning</p> <p>Organisation has not developed a mission statement or strategic plan</p>	<p>A training plan exists, but it is highly dependent on donor interests</p> <p>There is little or no involvement of stakeholders</p> <p>The organisation has a strategic plan but it is not usually respected; no alignment of training plan with organisation's mission</p>	<p>Donor support is controlled by the organisation, so that training activities are based on training needs, not donor interests</p> <p>Priorities are determined by training committee with input from stakeholders</p> <p>The training plan is well established and in alignment with the organisation's strategic plan and mission</p>

Design and Implementation of Training Activities	Stage 1	Stage 2	Stage 3
Design of training activities	<p>Design is based on interests and assumptions of the administration and trainer(s)</p> <p>Needs assessment is conducted only under certain donor-funded projects</p> <p>There is no complete assessment of organisational training needs, only for certain skills</p> <p>In-house skills for conducting needs assessments do not exist</p>	<p>Needs assessments are planned but not conducted systematically due to lack of resources</p> <p>Needs assessment findings play a small role in planning training and in participant selection</p>	<p>A training plan, based on needs assessments, is in place</p> <p>Participant selection for training events is based on need</p> <p>Trainers design and adapt workshops in response to identified participant needs</p>
Quality of training methodology	<p>Trainers have little or no knowledge of experience-based, participatory training methodology</p> <p>Trainers are selected based on their expertise in specific content areas, not their training skills</p> <p>Training is based on learning facts (knowledge) and not skills or attitudes</p>	<p>Trainers are aware of experience-based, participatory training but they are unable to do it on their own or on a regular basis</p> <p>Training sessions involve lectures followed by application--the role of the participant is a passive one</p> <p>Trainers are not creative in their methodology</p>	<p>Training focuses on critical thinking skills and active participation during the training event, reflecting experience-based training</p> <p>Training includes small group discussion and a variety of training activities and approaches</p>
Training materials	<p>All training materials are borrowed from outside sources</p> <p>Materials are not adapted to national or local situations</p>	<p>Most training materials are developed by external agents; trainers sometimes adapt them to address national/local context and needs</p> <p>Some training materials are developed by the trainers themselves or by others working within the same country or region</p>	<p>Trainers are selective in their use of materials developed by external agents, usually adapting material to the needs of the participants</p> <p>Funds exist for materials development</p> <p>The organisation has in-house capability to develop training materials</p>

Support for the Training	Stage 1	Stage 2	Stage 3
Senior management support	Little or no interest or involvement except during opening ceremonies or workshops	Senior management supports training and encourages integration of training in human resource development but is unable to seek sufficient funding to support training plan	Senior management actively seeks to fund priority training activities and works with training officers to institutionalise training
Mid-level management support	No awareness or involvement in training for improved performance Participants are selected for training as a favour or a reward for good performance	Management is aware of training activities but is not involved Supervisors are consulted in the training process but the link between training and supervision is not consistent	Management considers training as essential to improved performance Strong links exist between training and supervision through a collaborative relationship with the training unit
Stakeholder support	The concept of stakeholders is not considered in program planning and implementation Decision making is highly centralised and carried out by individuals with little or no training background	Stakeholders at most levels are included in discussion of training issues but their participation seems superficial A training committee exists but it meets infrequently; committee members fail to play a proactive role in supporting training	Training activities are supported by stakeholder involvement in planning and implementation Training committee plays an active advisory role Decision making is decentralised, enabling training officers to respond to need and demand

How Are You Doing?

Use the chart from pages 9-15 to 9-18 on a regular basis to assess your unit's development. The chart can help you envision the growth of your unit and identify areas for improvement. Remember, your unit's function will change as it grows and develops. Workplans and mission statements are meant to be flexible tools for you and your colleagues. Modify your strategies, workplans and mission statements as required to keep up with the changing role of your unit.

Use the checklist on page 9-19 to gauge your organisation's commitment to in-service training.

The chart on pages 9-15 to 9-18 showed me how far my unit has developed and how much more work we must do to improve the role of training. Let's use the checklist on the next page to confirm our findings.



A Checklist for Organisational Commitment to In-service Training

Key

- 1= **Stage One**- Not at all
2= **Stage Two** - In process
3= **Stage Three**- Completed

- | 1 | 2 | 3 | |
|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Your organisation has a mission statement agreed upon by employees at all levels. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The position of Training Officer exists with sufficient decision making power and is filled by an individual with an appropriate background and skills. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The Training Officer position is attractive and well-respected. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A functioning training committee exists. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The planning of training is a participatory process which involves stakeholders. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Senior management shows active support for training activities and commitment to instill a strong training ethic within the organisation . |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Resources are allocated for implementing priority training activities. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Senior management resists cutting the training budget. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Senior management seeks ways to increase funding for in-service training activities. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | A current training strategy and a training plan exists. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Training needs of employees are assessed and documented on a regular basis. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Job descriptions of supervisors and managers describe their roles relating to in-service training. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Some managers or supervisors help to conduct group training activities. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | There is commitment on the part of supervisors to provide pre-training input as well as follow-up support to someone who has attended a training activity. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Managers are held accountable for the training and development of their subordinates. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The organisation has conducted and documented in-house training activities according to the training plan. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All training activities are evaluated. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Evaluation results are used to improve training. |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Results of training activities are documented and circulated among stakeholders. |

REFLECTION QUESTIONS

Who are the training unit's stakeholders? What does each expect from the training unit? What does the training unit expect from each stakeholder?

Have any stakeholders formally discussed what the training unit could be like in the future?

When would be the best time to bring together stakeholders in order to discuss the situation of training in the organisation?

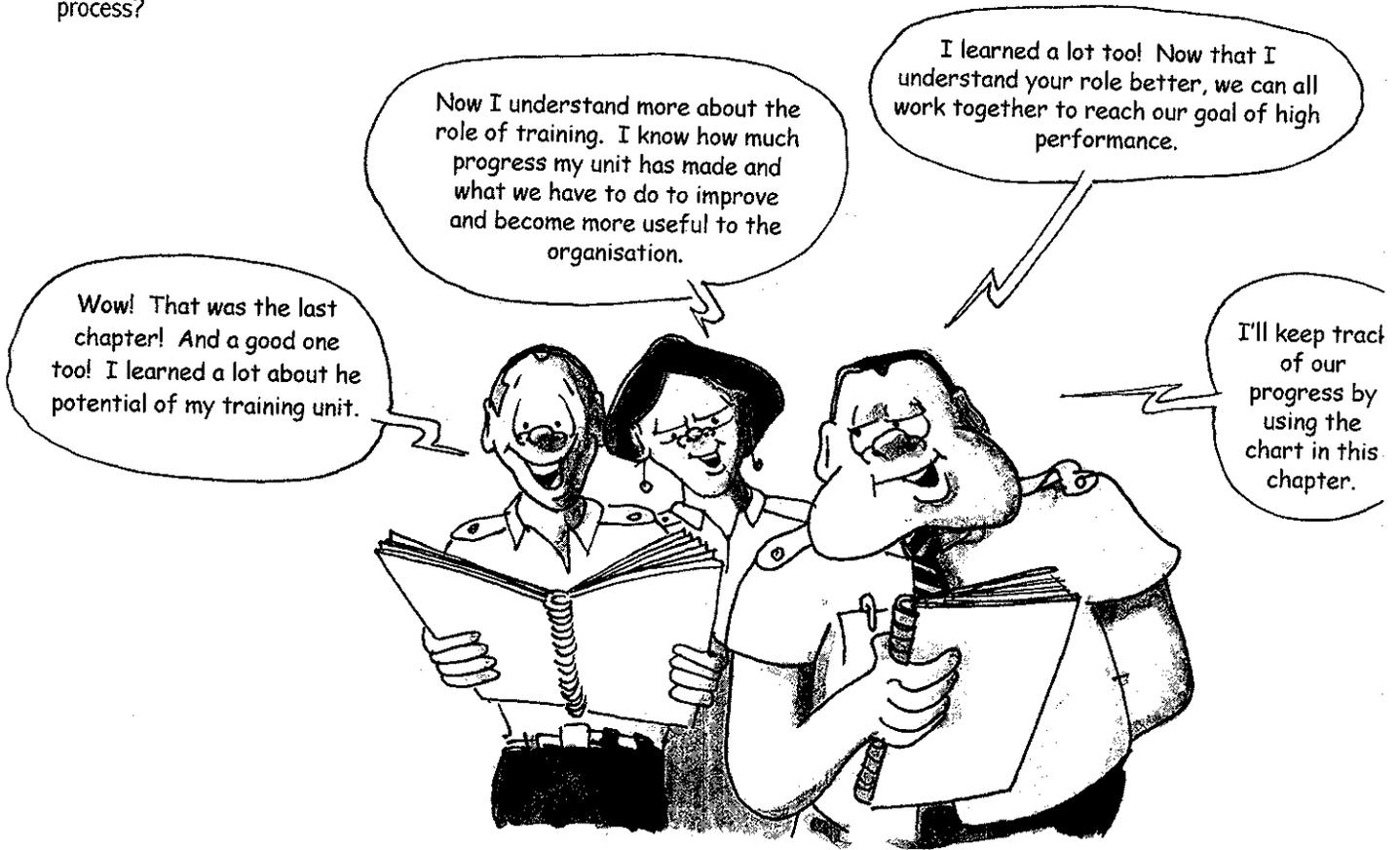
Which changes described in the chapter (or in the book) will be the easiest to make? Which changes will have the greatest positive impact on performance?

What interests does senior level management have in the training process?

Summary

While training officers are required to focus on the details of training, it is equally important for them to analyse where training stands in relation to their entire organisation. A review of the role of training in the organisation will demonstrate the extent to which training can contribute to greater organisational performance. This chapter has presented a process for analysing the present and envisioning the future in order to determine critical issues that will make the training unit more effective. On the basis of critical issues, the Training Officer can develop a work plan that will build on the successes and create new avenues for growth.

A series of charts has been presented to help training officers track the extent to which training is developing as an integral, institutionalised process within the organisation. It is useful to note that all aspects of the training system may not develop at the same pace. Training officers need to sensitise other stakeholders, especially senior managers, about the progress of training in facilitating improved performance among employees. Meetings with senior managers should have clear objectives based on priority needs of the training unit, and training officers need to adopt an approach that will encourage continued or increased senior level support. The checklist at the end of the chapter can be shared with senior-level managers and members of the training committee to help them understand areas where training can continue to grow.



Concluding Comments

Change is occurring all around us, both within and outside of the organisation. As a result, training is an ongoing process that never ends. New employees will join the organisation, bringing new skills and requiring other skills. Some employees will leave the organisation and many others will advance to higher positions. Senior managers will chart out new directions to follow as the organisation faces new challenges in protected area management. The demands on staff will require learning new competencies in order to face those challenges.

The role of the Training Officer is central to helping the organisation evolve to become a stronger institution, able to adapt in the face of change. Training programmes must respond with innovative training approaches and creative techniques, followed by careful reflection and assessment. The Training Officer must be willing to take risks and learn from the activities of the training unit.

This handbook has covered a number of topics that will help you to take better calculated risks because the content is based upon experimentation with new training approaches in protected area authorities throughout Africa. We hope that it will serve as a constant source of reference as you gain valuable experience and create greater impact through high-quality training activities. With support from this handbook, a critical, positive approach to your work in training will enable you to demonstrate with authority- 'What's Your Role'.

Annexes

Annex A

GLOSSARY

- Academic programme** - A series of courses at an educational institution, generally leading to a degree or certificate.
- Action plan** - A document prepared by a training participant to show how he or she will apply what was learned in training. An action plan links training with performance on the job through applied learning.
- Adult Learning** - The study of how adults acquire and use knowledge, skills and attitudes.
- Andragogy** - The theory of how adults learn.
- Attitude** - An individual's feelings made known to others through his or her behaviour or language.
- Behavioural objective** - A target that indicates how the learner will demonstrate increased knowledge, skills and/or attitudes. Also called learning objective, participant objective, or competency objective. It gives an indication of the extent and direction of behaviour change that should result from a training session.
- Cadre** - A group occupying a certain level, or professional position in the hierarchy of an organisation.
- Case study** - An example based on a real experience or situation.
- Conference** - A large meeting on a general topic or theme, usually lasting more than one day. A conference usually has a selection of smaller discussions, meetings, speakers, plenary sessions and presentations all happening simultaneously. A consensus for the resolution of a problem resolution is often the goal of a conference.
- Curriculum** - A written document that outlines the course of learning in a given area.
- Demonstration** - A form of presentation in which methods and procedures are shown to trainees. An initial demonstration followed by attempts by the trainees to repeat the activity. Useful for teaching step by step procedures, and for testing knowledge and skills.
- Distance learning course** - A course where the student can interact with instructors or professors without ever meeting them. Communication in distance-learning courses has traditionally occurred by mail, but it is becoming increasingly available by satellite, the Internet, educational television broadcasts, and videos.
- Evaluation** - An activity through which relevant information is collected and analysed in order to judge how well a program is achieving (or has achieved) its objectives.
- Experiential learning** - An inductive learning process whereby conclusions and actions are drawn based on analysis of individual or group experience(s).
- Experiential Learning Cycle** - A conceptual model of experiential learning that includes four phases: experience, reflection, conclusions, and action.
- Facilitator** - Someone who makes it easier to hold a discussion and to encourage shared participation. In general, a facilitator ensures that participants meet their expectations to the greatest extent possible during a meeting or workshop.
- Field visit** - A practical or observational learning activity that takes place outside of the training facility, usually lasting from half a day to two.
- Fishbowl discussion** - A discussion involving four participants and a number of observers. Participants must take preassigned points of view. An observer may replace a participant, but must continue to represent the point of view assigned to the original participant.
- Focus group discussion** - A structured discussion among approximately 5-12 people who have opinions on a given topic. A focus group is facilitated by one person who contributes questions for exploring the topic, probing issues, and clarification (but does not otherwise voice an opinion in the discussion).
- Goal** - The desired end result of a project or program, stated in more general terms than an objective.

Group problem solving - A process by which trainees share experiences and ideas in order to solve problems relevant to their work. Groups usually consist of four to seven trainees, and a facilitator.

Human resource development - The integrated use of training and development, career development, and organisation development to improve personal and organisational effectiveness.

In-service training - A training that does not take the employee out of the organisation for a long period of time. It takes place during the individual's term of service. A short-term training activity provided to an employee by the employer and relating to his/her job performance.

Institutionalisation - The process of establishing a sustainable, functioning capacity within an organisation.

Institutionalisation of training - The process of developing an organisation's training systems to become more sustainable through internal and external support.

Job description - A document that lists the duties and responsibilities for a position, including the job title, supervisory relationships, and the qualifications and skills required for the position.

Learning objective - (see Behavioural objective)

Management - A dynamic process of designing and maintaining an environment that enables individuals, working in groups, to efficiently achieve organisational objectives.

Mission statement - A brief, general statement describing an organisation's or a unit's main purpose. The mission statement provides the rationale for its goals, objectives, and actions.

Monitoring - An ongoing process of checking to see whether a programme is advancing as planned or needs adjustments.

Needs assessment - The process by which one determines gaps between employees' actual and desired performance on the job related to skills, knowledge and attitudes that can be influenced by training.

Networking - Establishing contact with, and access to, other people with whom you can exchange information, ideas, and resources.

Objective - The desired end result of an activity, stated more specifically than a goal.

On-the-job training - A training activity takes place during the normal course of work. Employees usually do not receive a certificate for this type of training. On-the-job training may include guidance from colleagues and/or supervisors, references, observation of others, and learning by doing. This is also called informal training.

Organisational development - The process of reviewing and changing systems, structures and approaches for better organisational performance.

Performance appraisal - A systematic process by which a supervisor evaluates an employee's behaviour and outputs over a given period of time through review, discussion, and documentation.

Per diem - A rate representing the daily cost of providing hotel, meals and incidental expenses for each individual in a training programme.

Practical - An activity where participants apply their new knowledge and skills in a real (or almost real) context. Practicals can take place during a field visit or through a simulation.

Record review - An examination of written documents that contain useful information for an evaluation or needs assessment. Records include reports, training records, performance appraisals, registers, letters, and memos.

Retreat - A meeting usually lasting at least two days in a location away from the work place.

Role play - A short, unrehearsed skit in which participants act according to the roles given them in order to experience and learn from a situation they might encounter on their jobs.

Seminar - A meeting to share ideas with an expert or experts on a specific topic. A seminar is smaller than a conference, and participants typically explore the topic and solve problems based on research.

Skill - The ability to carry out an action. A skill may be cognitive (such as mathematical skills) or behavioural (such as training skills).

Stakeholder - Someone who will be significantly influenced by or have an influence on the implementation and/or outcome of a project. Stakeholders include representatives of donor organisations, government agencies, collaborating institutions, community leaders and members, and the organisation's governing body and staff.

Strategy - A plan that lays out the steps needed to enable an organisation or unit to achieve programme goals.

Strategic plan - A document that outlines a long-term process to achieve organisational goals aligned with the organisation's mission and values. A strategic plan is the output of a series of meetings in which the organisation's mission, internal strengths and weaknesses, and external environment are all reviewed in order to determine critical issues for growth.

Study tour - A visit, usually to another country or region, with the objective of learning or understanding new practices relevant to the participant's job.

Supervision - On-the-job guidance provided by a superior through modelling, instructions, and feedback on a regular basis.

Sustainability - The ability of a programme to survive over time by generating its own sources of support.

SWOT analysis - An in-depth study of an organisation's strengths and weaknesses as well as the environment in which it functions (opportunities, and threats to organisational functioning). A SWOT analysis includes open discussions of these issues with the organisation's stakeholders.

Task analysis - An exercise through which the main responsibilities (duties/activities) of a cadre of employee are defined in terms of the knowledge, skills and attitudes required to be able to carry out those responsibilities effectively.

Terms of reference - A description of the responsibilities and activities for a short-term job (as with a consultant's job), indicating to whom the person reports.

Training - The systematic development of knowledge, skills and attitudes required for an individual to perform adequately a given task or job.

Training committee - A panel composed of representatives from different levels within the organisation with some experts or decision making power related to training within the organisation.

Training plan - A document that shows how the organisation will provide adequate and affordable in-service training to employees. The plan indicates what kind of training will be offered, when, and to whom.

Training record - An account maintained on every employee to track information on his or her history of job positions, education, and training.

Training strategy - A document that presents the organisation's policy on training and principles for addressing training needs at the organisational, departmental, and individual levels.

Workshop - A training activity for a group of people, lasting from one day up to approximately two weeks.

Workshop report - A document that records information about aspects of a training workshop useful to managers, participants, donors, and other stakeholders.

Annex B

ADDITIONAL READING (based on books found to be useful during the PARCS project)

Available from the Biodiversity Support Program, c/o WWF, 1250 24th Street N.W., Washington DC 20037, USA.

Protected Area Conservation Strategy (PARCS): Training Needs and Opportunities Among Protected Area Managers in Eastern, Central and Southern Africa by Barbara Pitkin (1995) ISBN 9966-884-88-2. *

Institutionalising In-Service Training in Protected Area Authorities in Africa: Final Report of the PARCS project by Deborah Snelson and Annette Lanjouw (1997). *

Undertaking a Training Needs Assessment: Revised Methodology of the PARCS project (1997).

* available in English and French

Available from The Centre for Development and Population Activities (CEDPA), 1717 Massachusetts Avenue, NW, Suite 200, Washington DC 20036, USA.

Training Trainers for Development. 1994. CEDPA Training Manual Series Vol. 1. *

Project Design for Program Managers. 1995. CEDPA Training Manual Series Vol. 2. *

Gender and Development. 1996. CEDPA Training Manual Series Vol. 3. *

Supervision: A Trainer's Manual. 1996. CEDPA Training Manual Series Vol. 4. *

* available in English, French and Spanish

Available from the Wildlife Conservation Society, 185th St and Southern Blvd. Bronx, NY 10460-1099, USA.

Wildlife Field Research and Conservation Training Manual by Alan Rabinowitz (1993)

Available from: WWF Publications, P.O. Box 4866, Hampden Post Office, Baltimore, MD 21211, USA.

A Guide to Designing Effective Proposals. 1991. ISBN 0-89164-127-0

A Guide to Financial Resource Development. 1993. ISBN 0-89164-129-7

Available from The Nature Conservancy, 1815 North Lynn Street, Arlington, Virginia 22209, USA.

Resources for Success. A Manual for Conservation Organizations in Latin America and the Caribbean. 1993

Miscellaneous

Knowles, M.S. (1996) The Adult Learner: A Neglected Species. Fourth edition. Houston Texas: Gulf Publishing Company. US \$ 21.95 ISBN 0884151077.

Storey, J. (ed) 1992. Human Resource Management: A Critical Text. Routledge; ISBN 0145091500. UK £. 15.99.

Reid, M., Barrington, H. and Kenney, J. 1992. Training Interventions, Managing Employee Development. 4th edition. IPM. ISBN 0852925662 UK £. 17.95.

Publications of the Biodiversity Support Program

General Series

- No. 1** *Designing Integrated Conservation and Development Projects*. Michael Brown and Barbara Wyckoff-Baird. Rev. ed. 1995. ISBN 1-887531-16-5. Also available in French (ISBN 1-887531-20-3) and Spanish (ISBN 1-887531-18-1).
- No. 2** *Sustainable Harvest of Non-timber Plant Resources in Tropical Moist Forest: An Ecological Primer*. Charles M. Peters. 1994. ISBN 1-887531-13-0. Also available in Spanish (ISBN 1-887531-14-9) (forthcoming in French and Bahasa Indonesia)
- No. 3** *Indigenous Peoples, Mapping and Biodiversity Conservation: An Analysis of Current Activities and Opportunities for Applying Geomatics Technologies*. Peter Poole. 1995. ISBN 1-887531-19-X
- No. 4** *Biodiversity in the Balance: Approaches To Setting Geographic Conservation Priorities*. Nels C. Johnson. 1995. ISBN 1-887531-23-8

Regional Series

Africa

- No. 1** *African Biodiversity: Foundation for the Future*. Biodiversity Support Program. 1993. (also available in French; ISBN 1-887531-24-6)
- No. 2** *Conserving Biodiversity in Africa: A Review of the USAID Africa Bureau's Biodiversity Program*. Jim Webster. 1994. Out of print
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