KALAHI-CIDSS NATIONAL COMMUNITY-DRIVEN DEVELOPMENT PROGRAM

TRAINING MANAGEMENT GUIDEBOOK

SEPTEMBER 2018

ASIAN DEVELOPMENT BANK

ADB

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6 ADB Avenue, Mandaluyong City, 1550 Metro Manila, Philippines
Tel +63 2 632 4444; Fax +63 2 636 2444
www.adb.org

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On the cover (from left to right): Community volunteers and residents attend a consultation session at a KC-NCDDP evacuation center in Barangay San Roque, Bulusan, Sorsogon, in August 2016; the nationwide implementation of the KC-NCDDP project has generated 758,952 construction-related jobs worth ₱975 million in wages of locally-sourced laborers; indigenous Manobo chieftains, elders, and staff of the Local Government of Talaingod in Davao del Norte stand proud at the KC-NCDDP-funded *Libulongan* (tribal hall); and community volunteers from Barangay Coroconog, San Roque, Northern Samar—a province in Eastern Visayas of the Philippines affected by Typhoon Haiyan—wear their pride as they gather for a village-wide meeting in March 2018 (photos by DSWD Kalahi-CIDSS).

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Acknowledgments

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The seed for the development of this Training Management Guidebook was sown during the June 2015 KC-NCDDP National Capacity Building Conference in Baguio City, attended by national and regional capacity building specialists.

Recognizing the value of standardizing KC-NCDDP training management practices given the program's decentralized implementation, Joel Mangahas, the predecessor TA project officer, served as a conference resource person, advising the preparation of this guidebook. His initial working draft was the basis for this final version. Alexander Glova, then deputy national program manager, reviewed the material and encouraged the development of a simple, user-friendly guidebook.

The KC-NCDDP National Program Management Office (NPMO) Capacity Building Unit led the preparation of the guidebook. Roberto Aguilar provided the blueprint for the content and format, assembled materials from the field, and reviewed drafts and provided inputs, assisted by Bernard Altavano and Johari Balaong. Maria Noralisa Bite's review and inputs ensured alignment with KC-NCDDP's learning and development framework. Cecilia Cruz-Panadero organized the materials and enhanced them with tested training management processes, practices, and standards. Ma. Rosario Consuelo Lagman and Jessica Inah Pangan of NPMO Social Marketing Unit provided the cover photos and captions.

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The publication of this guidebook was coordinated by Rowena Mantaring, consultant, with administrative support from Ralie Dusseldorf Flores, associate project analyst, SEHS. April-Marie D. Gallega, associate communications coordinator, Department of Communications; with consultants Layla Amar, copyeditor; Jasper Lauzon, graphic artist; Principe Nicdao, layout and composition artist; Cherry Lynn Zafaralla, proofreader; and Ma. Cecilia Abellar, page proof checker, comprised the production team.

Abbreviations

ACT	Area Coordinating Team
CEAC	Community Empowerment Activity Cycle
CSC	Civil Service Commission
DSWD	Department of Social Welfare and Development
FGD	focus group discussion
Four As	Activity-Analysis-Abstraction-Application
KALAHI-CIDSS	*Kapit-Bisig Laban sa Kahirapan* – Comprehensive and Integrated Delivery of Social Services
KC-NCDDP	KALAHI-CIDSS National Community-Driven Development Program
LGU	local government unit
LNA	learning needs analysis
M&E	monitoring and evaluation
ROI	return on investment
ROE	return on expectations
SLE	structured learning exercise
SME	subject matter expert

I

Introduction

Kapit-Bisig Laban sa Kahirapan–Comprehensive and Integrated Delivery of Social Services (KALAHI-CIDSS) National Community-Driven Development Program (KC-NCDDP) is a poverty reduction program of the Government of the Philippines, implemented by its Department of Social Welfare and Development (DSWD). It seeks to contribute to three goals: (i) reduced poverty; (ii) improved participatory local governance; and (iii) improved social capital by applying participatory, community-led, and community-driven approaches proven to be effective in community development work.

KC-NCDDP promotes empowerment through active community participation in the design, implementation, and management of development activities. It adopts a community-driven development model that is implemented through a four-stage, multi-activity Community Empowerment Activity Cycle (CEAC) (Figure 1).[1]

Figure 1: Community Empowerment Activity Cycle

Source: Government of the Philippines, Department of Social Welfare and Development. 2012. Community Empowerment Activity Cycle Field Guide for KALAHI-CIDSS Area Coordinating Teams. Unpublished.

The CEAC learning (process) is experiential where the learning builds progressively upon each other, and where learning is "life building," increasing awareness of rights, transparency, participation, and accountability.

[1] Government of the Philippines, Department of Social Welfare and Development. 2012. Community Empowerment Activity Cycle Field Guide for KALAHI-CIDSS Area Coordinating Teams. Unpublished.

Within the CEAC, training is one of many capacity building interventions that are conceptualized and implemented to “facilitate development from within, to creatively craft opportunities for the people to realize their own potential for change, and to nurture and build on this potential...” (footnote 1). Each training activity is thus considered an investment that would build people’s capacity and thereby empower them.

This Training Management Guidebook is envisioned to support KC-NCDDP’s capacity building strategies by providing learning facilitators with guidelines and quick reference tools in effectively and efficiently navigating the different phases of the training management cycle: analysis, design, development, execution, and monitoring and evaluation.

As a guidebook, it is best viewed and applied as tool that facilitates—rather than restrains—movement. Users are encouraged to innovate and improve processes and tools (to best meet the needs and context of target learners and communities), document, and share these with the community of learning facilitators.

II

Training–Learning Perspectives

This module of the Training Management Guidebook will

- differentiate training from learning;
- present key adult learning principles and conditions;
- discuss the 70-20-10 Learning Model and the Experiential Learning Model, and their implications for training management;
- differentiate learning styles;
- describe characteristics of intergenerational learners; and
- provide an overview of the training management cycle.

Training

Training can be defined as a human resource development intervention designed to facilitate the acquisition or enhancement of competencies, or specific knowledge, skills, and/or attitude among target learners so they become proficient in performing a job or a role in an organization or community. The key characteristics of a training intervention are the following:[2]

- initiated and driven by the organization, office, or unit;
- with planned objectives focused on competencies, or specific knowledge, skills, and/or orientation;
- short-term and time-bound (i.e., set number of days);
- targets a particular group of learners expected to demonstrate specific behaviors in performing a job or role; and
- may be in the form of face-to-face, online, or blended sessions.

The goal of training is to facilitate learning so that individuals and groups are able to acquire and demonstrate behaviors needed for effective performance of roles or tasks

[2] Adapted from W. J. Rothwell and H. J. Sredl. 2000. *The American Society Reference Guide to Workplace Learning and Performance: Present and Future Roles and Competencies*. 3rd ed., Vol. 1. Amherst, Massachusetts: Human Resource Development Press.

Learning

Learning is a process by which individuals acquire and develop competencies or specific knowledge, skills, and/or attitudes. Its key characteristics are as follows:

- driven by individual motivation;
- involves modification of behavior as a result of application of new competencies, or specific knowledge, skills, and/or attitudes;
- may be short-term or long-term (specific point in time when learning takes place varies from individual to individual);
- significantly influenced by on-the-job and life experiences and interaction with others; and
- can be facilitated by participation in formal interventions like training.

Adult Learning

KC-NCDDP works with adult learners in organizations and communities who bring with them a wealth of experience, as well as their specific contexts. These experiences and contexts, among others, have significant bearing in the way they would acquire new learning to become more empowered development contributors.

In the 1970s and 1980s, education theorist Malcolm Knowles developed five assumptions about the characteristics of adult learners that differentiate them from child learners (Figure 2).[3]

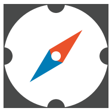
Figure 2: Five Assumptions about Adult Learners According to Malcolm Knowles

SELF CONCEPT
- Moves from that of a dependent personality to one of being self-directed

LEARNER EXPERIENCE
- Growing reservoir of experience becomes significant resource for learning

READINESS TO LEARN
- Becomes increasingly oriented toward developmental tasks of social roles

MOTIVATION TO LEARN
- Becomes increasingly internal



LEARNING ORIENTATION
- Shifts from subject- to problem-centered
- Application of learning moves from postponed to immediate

Source: J. Litster. 2016. *The Principles of Adult Learning*. UCL Institute of Education. April. https://ec.europa.eu/epale/sites/epale/files/the_principles_of_adult_learning_.pdf.

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3 J. Litster. 2016. *The Principles of Adult Learning*. UCL Institute of Education. April. https://ec.europa.eu/epale/sites/epale/files/the_principles_of_adult_learning_.pdf.

Learning Principles and Conditions

Earlier in 1969, Gerald Pine and Peter Horne, also educators like Knowles, identified several key principles of adult learning that highlighted its highly personal and multidimensional nature (Figure 3).[4]

Figure 3: Principles of Adult Learning

Learning is highly personal...............	• Occurs inside the learner and is activated by the learner • Involves discovery of personal meaning and relevance of ideas • Is a consequence of unique experiences
Learning is multidimensional...	• Both emotional and intellectual • Cooperative and collaborative process • Evolutionary more than revolutionary

Source: G. Pine and P. Horne. 1999. Principles and Conditions of Adult Learning. In C. Ortigas, *Group Process and the Inductive Method*. Quezon City: Ateneo de Manila University.

These assumptions and principles can guide learning facilitators in designing and executing training interventions. They are not hard and fast rules, though. We are reminded that aside from considering what is different about adult learners and the adult learning process, the contexts and actual practices in which adults engage and perform their jobs or roles are always essential considerations.

Pine and Horne likewise identified conditions that facilitate adult learning (Figure 4). These conditions serve as important reminders to learning facilitators when designing learning activities, preparing the learning environment, and facilitating learning sessions (footnote 4).

[4] G. Pine and P. Horne. 1999. Principles and Conditions of Adult Learning. In C. Ortigas, *Group Process and the Inductive Method*. Quezon City: Ateneo de Manila University.

Figure 4: Conditions That Facilitate Adult Learning

Source: G. Pine and P. Horne. 1999. Principles and Conditions of Adult Learning. In C. Ortigas, *Group Process and the Inductive Method*. Quezon City: Ateneo de Manila University.

Learning Models

Many organizations recognize that training as a stand-alone intervention may not be sufficient to fully achieve planned learning objectives and effect sustainable transfer of learning to life situations.

In the 1980s, Michael Lombardo and Robert Eichinger of the Center for Creative Leadership, a nonprofit educational institution, developed the 70-20-10 learning model based on the developmental experiences of successful managers (Figure 5). The model posits that a significant amount of learning (70%) takes place in real life situations, with the least (10%) from attendance to training programs and other formal learning sessions, and self-study through reading.[5]

While the numbers may not be exactly 70-20-10, the model highlights the need for a holistic blend of learning approaches that are carefully planned and conceptualized to address learning needs.

[5] S. Scott and O. Ferguson. 2016. *New Perspectives on 70:20:10*. https://www.goodpractice.com/ld-resources/new-perspectives-on-70-20-10-2nd-edition/.

Figure 5: 70-20-10 Learning Model

Source: S. Scott and O. Ferguson. 2016. *New Perspectives on 70:20:10*. https://www.goodpractice.com/ld-resources/new-perspectives-on-70-20-10-2nd-edition/.

The 70-20-10 model emphasizes that a training program (10) should not be planned as a stand-alone event, but as part of an integrated package of competency building interventions. Likewise, it calls the attention of learning facilitators to ensure that training design and execution prepares learners for follow-through and supplementary learning (70-20) that will happen once they leave the classroom.

Experiential Learning Model

David Kolb, also an education theorist, published the Experiential Learning Model in 1984. Consistent with adult learning principle and conditions, and the 70-20-10 learning model, it emphasizes the critical role of experience in the learning process (Figure 6).[6]

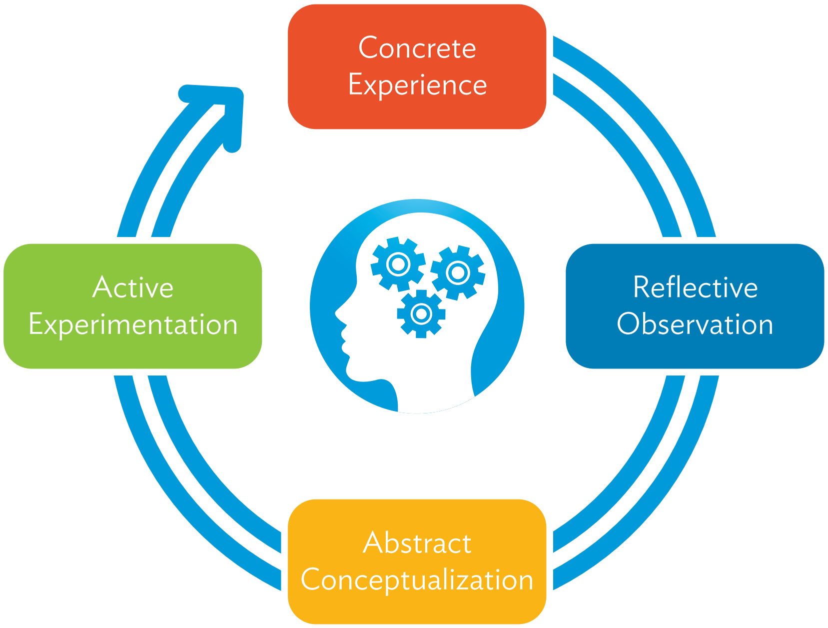
According to the Experiential Learning Model, which is depicted through a four-stage learning cycle, the learner's concrete experiences are triggers for reflective observations and analysis.

The learner's reflections are processed and distilled into abstract concepts or generalizations, from which new implications for actions are drawn. These implications can then be tested, and provide basis for new experiences (footnote 4).

In the context of formal learning sessions or training programs, learners are provided "concrete experiences" through simulated or structured learning exercises (SLEs). These SLEs are then processed by the facilitator, so that learners are guided through the experiential learning cycle. The choice of meaningful SLEs is an important task in designing the training program, and its administration and processing, during training execution.

[6] D. Kolb and R. Boyatzis. 1999. *Experiential Learning Theory: Previous Research and New Directions*. https://www.d.umn.edu/~kgilbert/educ5165-731/Readings/experiential-learning-theory.pdf.

Figure 6: Experiential Learning Cycle



Source: D. Kolb and R. Boyatzis. 1999. *Experiential Learning Theory: Previous Research and New Directions.* https://www.d.umn.edu/~kgilbert/educ5165-731/Readings/experiential-learning-theory.pdf.

David Kolb defines learning as "the process whereby knowledge is created through the transformation of experience," a definition that resonates the experiential learning process that is embedded in the different stages of the CEAC.

Learning Styles

Aligned with the Experiential Learning Model, Kolb identified four basic learning styles based on research and clinical observation (Figure 7).

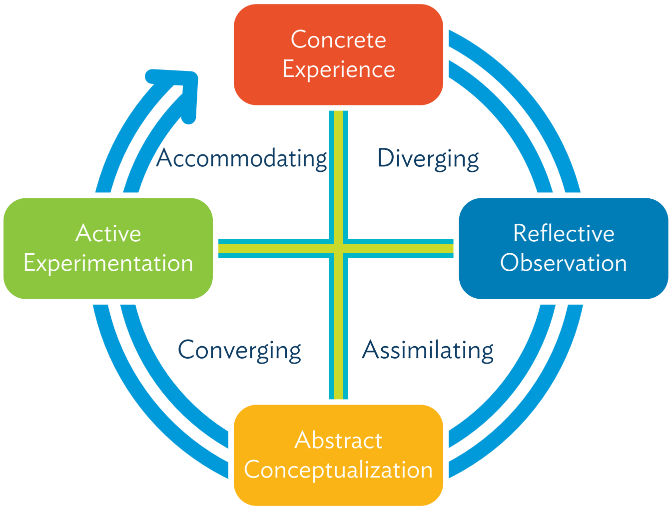
Figure 7: Learning Styles

Accommodating—People with active experimentation and concrete experience as dominant learning abilities

- learn best from hands-on experience;
- prefer working with others to set goals, doing field work, and testing different approaches;
- enjoy challenging experiences and carrying out plans; and
- tend to rely on people for information than own technical analysis.

Diverging—People with concrete experience and reflective observation as dominant learning abilities

- are best at idea generation,
- prefer working in groups,
- listen with an open mind, and
- are receptive to feedback.



Converging—People with abstract conceptualization and active experimentation as dominant learning abilities

- are best at finding practical uses for ideas and theories;
- prefer simulations, laboratory assignments, and practical applications;
- enjoy technical tasks over interpersonal and social issues; and
- adept at problem solving and decision making.

Assimilating—People with reflective observation and abstract conceptualization as dominant learning abilities

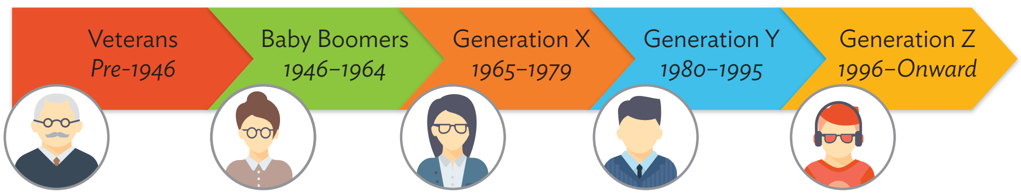
- are best at organizing information into logical and concise form,
- prefer readings and lectures,
- enjoy exploring analytical models, and
- usually need time to think things through.

Source: D. Kolb and R. Boyatzis.1999. *Experiential Learning Theory: Previous Research and New Directions*. https://www.d.umn.edu/~kgilbert/educ5165-731/Readings/experiential-learning-theory.pdf.

Intergenerational Learners

KC-NCDDP partners with stakeholders from multiple generations, maybe even from five generations. It is thus highly possible that there are intergenerational learners participating in a training event or learning session, with varying orientation to learning (Figure 8). For example, veterans and baby boomers have been exposed to more traditional and formal classroom-based learning approaches; while the younger generations, particularly those from generation Y (also known as millennials) and generation Z, to more dynamic and digital learning modes.

Figure 8: Some Generational Characteristics



Veterans:
- Loyal
- Hardworking
- Dedicated

Baby Boomers:
- Competitive
- Workaholics
- High need for recognition

Generation X:
- Pragmatic
- Independent
- Adaptable

Generations Y and Z:
- High self-confidence
- Multitaskers
- Visual and experiential learners
- Used to instant gratification
- Prefer “just in time” learning

Source: J. Hart. 2008. Understanding Today’s Learner. *Learning Solutions Magazine*. 22 September. http://www.cedma-europe.org/newsletter%20articles/eLearning%20Guild/Understanding%20Todays%20Learner%20(Sep%2008).pdf.

The characteristics listed in Figure 8 may not always be true for all learners belonging to a particular generation. What is becoming more evident though is the effect of technology exposure and use on the way the current breed of learners process information.

Marc Prensky coined the metaphor “digital native” in 2001 to describe people who have known only the digital culture, or grew up with the digital language of computers, video games, and the internet. These are members of generations Y and Z. He also used the term “digital immigrant” to describe people who have learned to use technology to adapt to the environment. These are the veterans and baby boomers, and many members of generation X.

Prensky asserts that attitudes and preferences formed by those who grew up in the pre-digital culture can clash with those who were born in the digital culture. For one, digital natives thrive on quick or instant access to information, parallel processes, and multitasking. They respond first to graphics before text. Digital immigrant instructors using pre-digital language and step-by-step teaching processes will have to understand the learning styles of digital natives, and explore approaches that will be more meaningful and responsive to their needs.[7]

[7] M. Prensky. 2001. Digital Natives, Digital Immigrants. *On the Horizon*. 9 (5). October. MCB University Press. http://www.marcprensky.com/writing/Prensky%20-%20Digital%20Natives,%20Digital%20Immigrants%20-%20Part1.pdf.

Given the characteristics and diverse learning preferences of adult learners, learning facilitators need to

- begin by identifying the profile and needs of target learners;
- employ the appropriate blend of learning methodologies that will engage intergenerational learners;
- closely monitor learners' responses to learning process; and
- conduct iterative formative evaluation as basis for refining design and execution.

Training Management Cycle Overview

The training management cycle has the following four sequential components (Figure 9):[8]

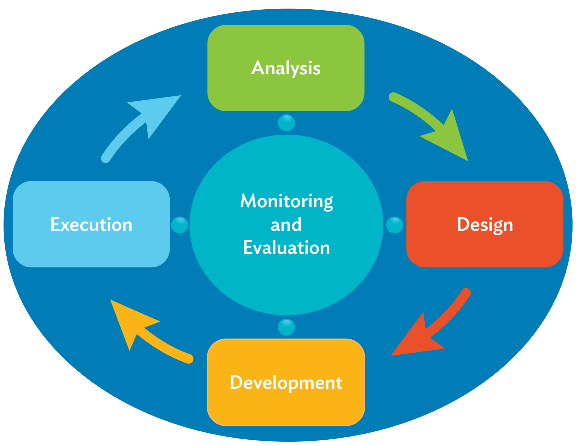
(i) **Learning needs analysis.** This involves identifying competencies that learners need to develop to be able to perform job or roles.

(ii) **Training design.** This involves formulating learning objectives, identifying and organizing content areas, and selecting appropriate methodologies.

(iii) **Materials development.** This involves identifying and preparing teaching–learning aids that facilitators and learners will use during training, as well as job aids that learners can use back on the job or their communities.

(iv) **Training execution.** This involves implementing the training program as designed, including management of learning and resources.

Figure 9: Training Management Cycle



Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

The fifth component, monitoring and evaluation (M&E), is at the center, as some form of formative and summative M&E happens at each phase of the cycle.

Each of the components will be covered in detail in the succeeding modules of this Training Management Guidebook.

[8] Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

III

Learning Needs Analysis

This module of the Training Management Guidebook will
- discuss the value and purpose of a learning needs analysis (LNA);
- differentiate opportunity-based and performance gap-based approach to LNA;
- explain key steps in conducting LNA;
- identify LNA data sources;
- differentiate various LNA methods and tools;
- discuss some considerations in choosing appropriate learning interventions; and
- identify elements of LNA report.

Value and Purpose of a Learning Needs Analysis

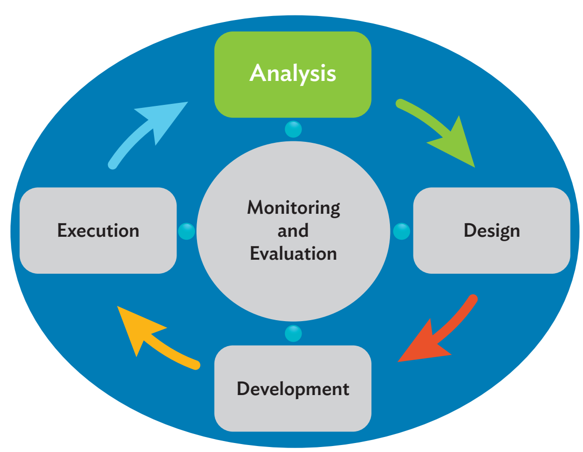
A training program starts way before the facilitator stands in front of the participants to welcome them to the activity. It actually begins with a learning needs analysis (LNA), the critical first phase of the training management cycle (Figure 10).

An LNA answers the question: "Is there a competency gap among target learners that can reasonably be addressed by a training intervention?" Oftentimes referred to as the cornerstone of training, an LNA provides justification, and helps generate buy-in among stakeholders for conducting a training program.

Specifically, an LNA

- pins down and isolates competency gaps that can be best addressed by training,
- determines learning objectives and outcomes, and
- generates a profile of target learners (including preferred learning styles).

Figure 10: Learning Needs Analysis (First Phase of Training Management Cycle)



Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

An LNA
- informs the process of choosing the mix of learning interventions and identifying the training platform (e.g., classroom, on-the-job, online, etc.) to use; and
- guides training design, development of training-learning materials, execution, and monitoring and evaluation of the training intervention.

It can be tempting to rush into planning and conducting training when a performance deviation is apparent. Considering that training is one of the costliest types of learning and development interventions, some form of learning needs analysis—whether full-blown or abbreviated, formal or informal, should always be undertaken. This is to validate if the performance problem is caused by competency gaps, and if investing in training is the best solution.

Learning Needs Analysis Approaches

Organizations vary in their LNA practices, mostly influenced by triggers that call for the conduct of LNA, among which are the following:

- input to annual learning and development planning process;
- performance problem that seems to be due to lack of competencies; and
- a new project, service, system, etc. that require competencies not present among the job or role performers.

Given these triggers, one or both of two approaches to LNA may be applied: (i) opportunity-based and (ii) performance gap-based.

Opportunity-Based

The opportunity-based approach to LNA facilitates identification of a complete set of sequential learning necessary for a particular job or role. The opportunity-based approach

- is best applied when developing a training curriculum or plan, and when designing basic orientation program and
- works best when competency requirements and standards are well defined.

An opportunity-based approach to learning needs analysis
- proactively assesses current competency level of job or role performers vis-à-vis competency requirements,
- prevents or minimizes future problems by identifying competencies required for successful performance, and
- catches existing performance problems caused by inadequate competencies

OPPORTUNITY-BASED

The approach has its downsides though:

- Conducting an LNA requires more time as all behaviors related to successful job or role performance are analyzed.
- It may not lead to a timely solution to an immediate performance problem.

Performance Gap-Based

The performance gap-based approach to LNA facilitates identification of training or other learning interventions to address an immediate problem. This approach

- is best applied when performance targets are not being met, possibly due to inadequate competencies and
- works best when performance standards and measures are defined.

This approach has downsides, which include the following:

- It may lead to fire-fighting mode if used as the sole approach to LNA.
- Learning opportunities to prepare job or role performers for new projects and tasks can be overlooked.

The performance gap-based approach to learning needs analysis

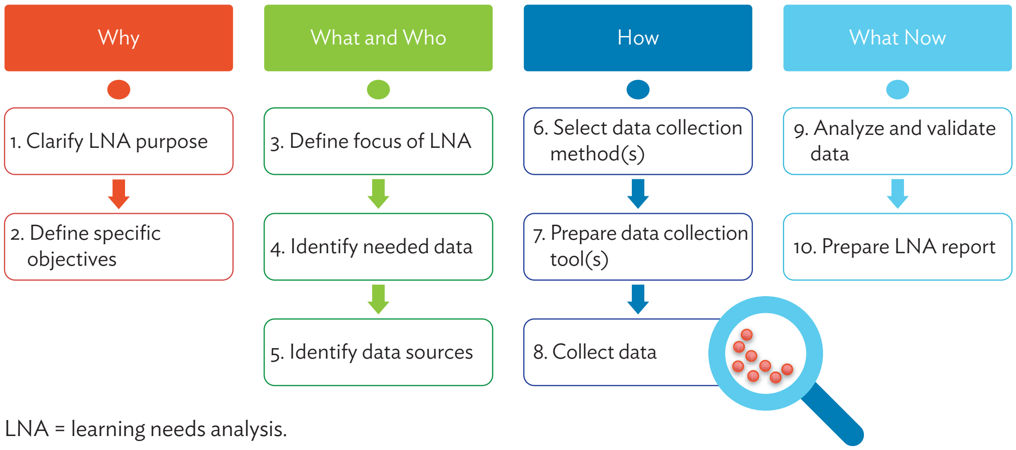
- analyzes immediate performance problem to determine causes, and
- isolates competency gaps (among job or role performers) that are causing performance deviation.

PERFORMANCE GAP-BASED

Steps in a Learning Needs Analysis

Whether an opportunity-based or performance gap-based approach is used, the following steps will guide the LNA process (Figure 11). The difference would be in the selection of data collection methods and tools, and the rigor of data gathering. For example, validation of causes of an urgent performance problem requires easier and faster methods like focus group discussion among key informants, instead of a survey that can get data from a bigger population, but which involves questionnaire construction, administration, retrieval, and processing—all of which take time.

Figure 11: Steps in Learning Needs Analysis



LNA = learning needs analysis.

Source: Adapted from American Society for Training and Development. 2008. *Instructional Design and Implementation In ASTD/Infoline: Tips, Tools and Intelligence for Trainers*. Vol. 2. Baltimore, Maryland: ASTD Press.

Why a Learning Needs Analysis?

The first two steps in the LNA process clarify the "end in mind," and thus inform the entire LNA planning and execution.

Some questions to ask

Why are we undertaking an LNA?

How will we use the LNA results?

What set of information will we have by the end of the LNA?

What and Who?

Steps 3 to 5 define the breadth and depth of the scope of the LNA. These include defining levels of analysis, performance areas, and population of employees or stakeholders to be covered.

What level(s) of analysis will we do?
- Organizational?
- Group?
- Individual?

What performance areas and competency requirements will we look into?

Who will be covered by the LNA?

What data do we need?

What are our data sources?

Who are our key informants?

Competency Framework

Having a competency framework facilitates the conduct of learning needs analysis, as it is an important reference for assessing existing proficiency levels of job or role performers.

In 2014, the Philippines' Department of Social Welfare and Development (DSWD) institutionalized a Competency Dictionary, one of the major outputs of the Competency Modeling and Enhancing the Recruitment System project. This was an intervention funded by the Department of Foreign Affairs and Trade (DFAT) of the Government of Australia, and implemented by the Philippines–Australia Human Resource and Organisational Development Facility.[9] The dictionary provided the framework for identifying competencies, defined as "demonstrable characteristics of a person that enables him or her to do a job very well,"[10] for DSWD personnel. It consists of a set of competencies, with definitions and behavioral indicators at different proficiency levels.

This Competency Dictionary guided the identification of competency requirements for *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project (KC-NCDDP) program staff and key implementation partners (i.e., Sub-Regional Project Management Office Teams, Area Coordinating Teams,

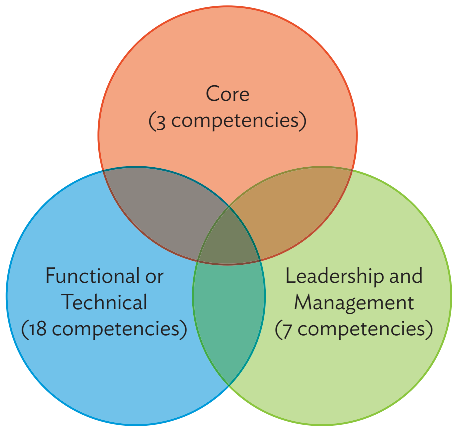
[9] The Philippines–Australia Human Resource and Organisational Development Facility was a project of the Australian government in the Philippines in 2011–2017 to help build the foundation of good governance in the selected organizations critical in delivering the mutual development priorities of Australia and the Philippines.

[10] Philippines–Australia Human Resource and Organisational Development Facility and Department of Social Welfare and Development. *DSWD Competency Cards: Introduction to Competency*. https://www.australiaawardsphilippines.org/partners/cpos-and-psps/dswd/2011-2012/HROD%20Plan/Prioritised%20HROD%20Interventions/intervention-2-strengthening-the-recruitment-selection-and-placement-system/uploaded-documents/misc_2/dswd-competency-cards-introduction-to-competency.pdf.

and Municipal Coordinating Teams). In the process of validating the KC-NCDDP competency requirements, refinements were introduced to integrate functional competencies, and identify critical competencies at the program and individual levels.[11]

The KC-NCDDP Competency Framework includes 28 competencies, divided into three clusters (Figure 12).[12]

Figure 12: Competency Clusters



Core	Leadership and Management	Functional or Technical
• Relates to DSWD's values, mission and culture • Reflects core organizational capabilities • Possessed by all employees regardless of function	• Relates to skills, knowledge and behaviors needed to perform leadership/ managerial work and processes • Deals with interactions with individuals or groups	• Relates to specific bodies of knowledge and skills required to perform defined activities in a function or job • Includes abilities to use procedures, techniques and knowledge of a specialized field

DSWD = Department of Social Welfare and Development.

Source: National Program Management Office, DSWD *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project.

[11] J. Evangelista. 2014. Implementation of Competency-Based Recruitment, Selection, and Placement System (CBRSPS): The DSWD Experience. Unpublished.

[12] Philippines–Australia Human Resource and Organisational Development Facility and Department of Social Welfare and Development. *DSWD Competency Cards-Introduction to Competency*. https://www.australiaawardsphilippines.org/partners/cpos-and-psps/dswd/2011-2012/HROD%20Plan/Prioritised%20HROD%20Interventions/intervention-2-strengthening-the-recruitment-selection-and-placement-system/uploaded-documents/misc_2/dswd-competency-cards-introduction-to-competency.pdf; Philippines–Australia Human Resource and Organisational Development Facility and Department of Social Welfare and Development (accessed 30 June 2017); *DSWD Competency Dictionary: Functional Competencies*. https://www.australiaawardsphilippines.org/partners/cpos-and-psps/dswd/2011-2012/HROD%20Plan/Prioritised%20HROD%20Interventions/intervention-2-strengthening-the-recruitment-selection-and-placement-system/uploaded-documents/misc_2/dswd-competency-cards-functional-competencies.pdf (accessed 30 June 2017); and Philippines–Australia Human Resource and Organisational Development Facility and Department of Social Welfare and Development. *DSWD Competency Dictionary: Leadership Competencies*. https://www.australiaawardsphilippines.org/partners/cpos-and-psps/dswd/2011-2012/HROD%20Plan/Prioritised%20HROD%20Interventions/intervention-2-strengthening-the-recruitment-selection-and-placement-system/uploaded-documents/misc_2/dswd-competency-cards-leadership-competencies.pdf.

Table 1 shows the competencies under the three clusters (footnote 8).

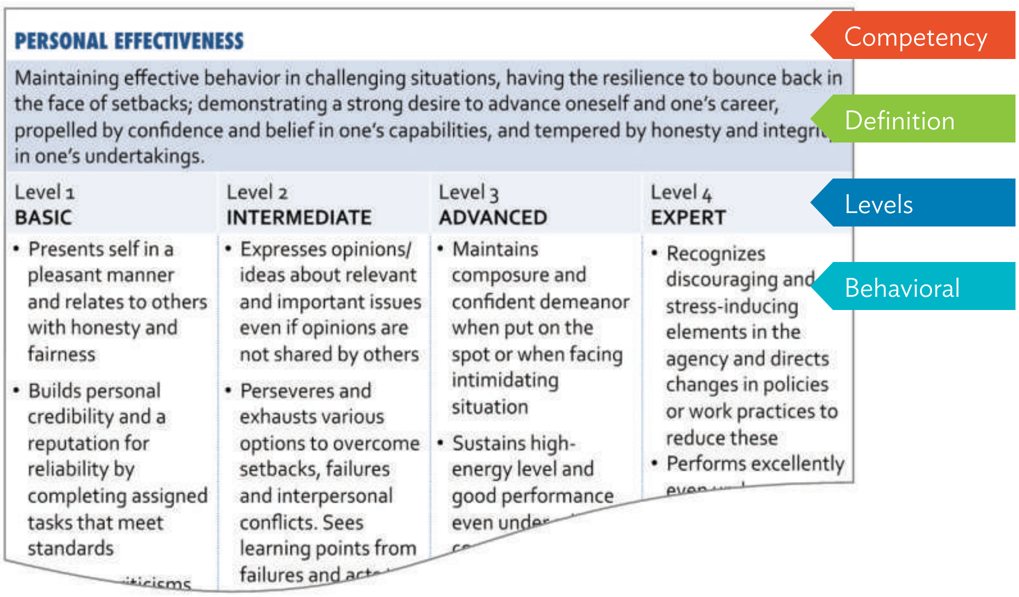
Table 1: Competencies Grouped by Cluster

Core	(i)	commitment to credible public service
	(ii)	delivering excellent results
	(iii)	personal effectiveness
Managerial and/or Leadership	(i)	collaborating and networking
	(ii)	creating an environment for learning and growth
	(iii)	engaging and inspiring teams
	(iv)	facilitating change and innovation
	(v)	planning and organizing
	(vi)	problem solving and decision-making
	(vii)	thinking strategically and systematically
Functional	(i)	community organizing
	(ii)	community-based project fiscal management
	(iii)	information and communication technology literacy
	(iv)	developing institutional capabilities
	(v)	engineering expertise
	(vi)	grievance management
	(vii)	group facilitation
	(viii)	mobilizing for responsive community-driven development
	(ix)	office management and secretariat services
	(x)	presentation skills
	(xi)	process management
	(xii)	program monitoring and evaluation
	(xiii)	project management
	(xiv)	records management
	(xv)	report writing (subsumes written communication)
	(xvi)	training administration
	(xvii)	training design and methodologies
	(xviii)	verbal communication

Source: National Program Management Office, Department of Social Welfare and Development *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project.

Each competency has a particular structure illustrated in Figure 13.

Figure 13: Competency Structure



Notes:
1. **Definition**. This is a brief general description of type of behaviors under a competency.
2. **Competency or proficiency levels**. This is the progression of sophistication and complexity at which the competency can be demonstrated and utilized in performing essential duties and responsibilities.
3. **Behavioral indicators**. These are specific behaviors associated with the competency at different levels.

Source: National Program Management Office, Department of Social Welfare and Development *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project.

Competency or proficiency levels are described in detail in Table 2.

Table 2: Competency or Proficiency Levels

Level 1 BASIC	Level 2 INTERMEDIATE	Level 3 ADVANCED	Level 4 EXPERT
SCOPE/CONTEXT			
• **Limited to own tasks and usually requires supervision and further training** • **Competency is at a level where specific procedures are observed**	• Generally confined in own set of tasks • Has tasks that require working with others • Some activities not necessarily covered by procedures	• Covers and/or integrates work of different individuals, work groups, multiple tasks, diverse work units, and varied situations	• Involves work of different units, operational systems and processes in a dynamic environment

continued on next page

Table 2 *continued*

Level 1 BASIC	Level 2 INTERMEDIATE	Level 3 ADVANCED	Level 4 EXPERT
COMPLEXITY			
• **Basic, rudimentary and routine tasks requiring less analysis** • **Needed information is almost always given**	• Less information is present • Requires resourcefulness and some degree of analysis related to other tasks • Less routinary	• Requires moderate degree of analysis and evaluation of routine and non-routine tasks, inter-dependence of tasks and own and others' performance	• Requires high degree of analysis of systems and processes, results, and performance and environmental and institutional variables
AUTONOMY AND RESPONSIBILITY			
• **Completely supervised** • **Consults** • **No decision-making authority**	• Most tasks and/or activities can be done independently given clear directions, standards and procedures of work • Requires consultation for nonfamiliar, nonroutine tasks and situations	• Independent work covering responsibility for others' work	• Independent work and covers responsibility and accountability over various units' (operational and organizational) performance

Source: Philippines–Australia Human Resource and Organisational Development Facility and Department of Social Welfare and Development. *DSWD Competency Cards-Introduction to Competency*. https://www.australiaawardsphilippines.org/partners/cpos-and-psps/dswd/2011-2012/HROD%20Plan/Prioritised%20HROD%20Interventions/intervention-2-strengthening-the-recruitment-selection-and-placement-system/uploaded-documents/misc_2/dswd-competency-cards-introduction-to-competency.pdf.

Each KC-NCDDP position has a Success Profile that indicates

- job summary,
- key tasks,
- job outputs, and
- competency requirements.

The competency requirements spell out the competencies, level of proficiency, and behavioral indicators.

Data Sources

There are numerous sources of data when conducting an LNA (Table 3).

Table 3: Learning Needs Analysis Data Sources

Documents and Reports	Informants
• Performance appraisals • Performance measures (e.g., Balance Scorecard) • Project monitoring and evaluation report • Attendance • Safety incidents • Grievances • Turnaround time of processes • Client feedback • Project expenses • Outputs of staff	• Job or role performers • Supervisors • Internal clients of job and/or role performers • External stakeholders and/or clients

Source: National Program Management Office, Department of Social Welfare and Development *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project.

Select sources that will provide the most meaningful data to support the LNA, particularly if there is an apparent performance gap that triggers the assessment. It is important that the triangulation method is applied in determining sources of data to increase the validity of LNA results. This would mean combining multiple data sources so that various dimensions of performance and competency gaps are checked. A key data source when conducting LNA is always the job or role performer.

How?

Steps 6 to 8 in Figure 11 involve preparing for, and the actual process of data gathering. Methods and tools are identified and developed, population or sample of respondents is drawn up, and data collection methods are applied (Table 4).

Some questions to ask

How will we collect data? What methods will we use?	What tools do we need to develop?	What is our timetable of activities? Who will do what by when?	How do we document data gathering activities?

Table 4: Common Data Collection Methods and Tools—Applications and Limitations

Method	Tool
Interview ✓ Most useful when in-depth information has to be drawn out from a key respondent * Time-consuming * Requires skillful interviewer who can probe effectively	Interview Guide
Survey or Questionnaire ✓ Most useful when data on several items need to be generated from many respondents ✓ Easy to process when properly constructed * Requires skillful questionnaire developer * Response rate and retrieval can be a challenge when administered online or through email	Questionnaire (Questions with scale)
Observation ✓ Most useful when performance gap and competencies involve demonstrable work processes and services * Can be seen as intrusive, which can affect behaviors of target job or role performers * Time-consuming	Observation Guide (What to look for)
Focus group discussion (FGD) ✓ Most useful when in-depth information and views need to be drawn out from "experts" on the topic ✓ Can be applied when quick validation of an urgent performance problem and its causes is needed * Requires skillful moderator and documenter	FGD Guide Questions
Work samples review ✓ Most useful when performance gap and competencies involve outputs being produced by job or role performers * May require review of several work samples to establish pattern and trend	Checklist (What to look for)
Documents review ✓ Most useful in establishing patterns, trends and consistency of practice ✓ Easy to refer to because of documentation * Dependent on accuracy and completeness of documents	Checklist (What to look for)
Tests ✓ Most useful when performance gap and competencies requires job or role performers to understand and apply considerable knowledge sets ✓ Easy to process when properly constructed * Requires skillful test developer * Can be threatening to respondents	Test items and scoring protocol

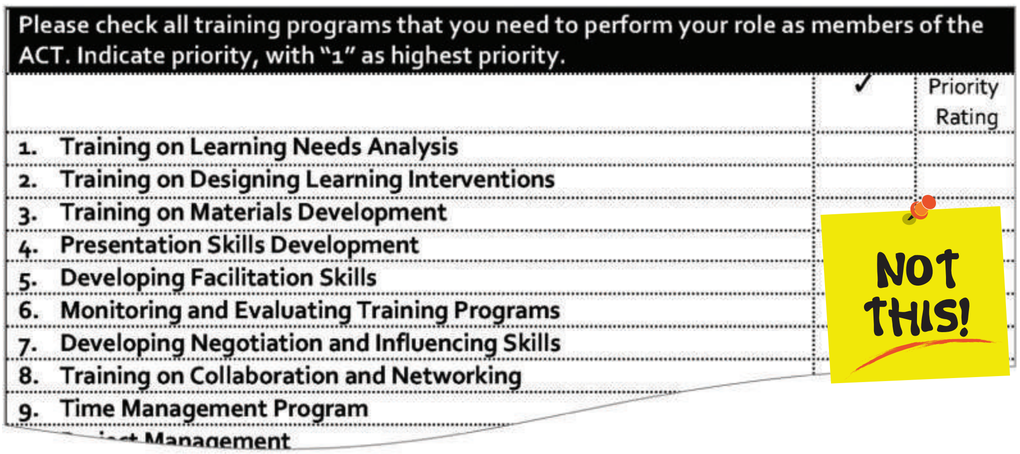
Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

The triangulation process should be employed in choosing the data collection methods and tools. Major considerations are the nature of the performance gap and competencies, size of sample respondents, available time, and competence of LNA team members in applying the methods and tools.

IMPORTANT REMINDER!

A common pitfall when collecting LNA data is asking informants about what training programs are needed by job or role performers even before competency levels are assessed vis-à-vis requirements. Sometimes, questionnaires include a laundry list of training programs where respondents can choose the ones they "need" (Figure 14).

Figure 14: Sample Questionnaire Entry to Identify Training Programs "Needed" by Respondents



Please check all training programs that you need to perform your role as members of the ACT. Indicate priority, with "1" as highest priority.

	✓	Priority Rating
1. Training on Learning Needs Analysis		
2. Training on Designing Learning Interventions		
3. Training on Materials Development		
4. Presentation Skills Development		
5. Developing Facilitation Skills		
6. Monitoring and Evaluating Training Programs		
7. Developing Negotiation and Influencing Skills		
8. Training on Collaboration and Networking		
9. Time Management Program		
Management		

Source: National Program Management Office, Department of Social Welfare and Development *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project.

This deviates from the purpose of the LNA, which is to identify competency gaps as basis for determining appropriate learning interventions. This can result in a training wish list, the execution of which can possibly lead to wasted resources. Developing data gathering tools is thus a critical LNA task.

The accepted practice is to use the Success Profile, particularly the Competency Requirements (Proficiency Level and Behavioral Indicators) as basis for assessing the incumbent's current competency level, and apply a rating scale (Table 5).

Table 5: Sample Eight-Point Rating Scale

Rating	Definition
8	All behavioral indicators are demonstrated in a consistent and sustained manner and all work results are considered best practice.
7	All behavioral indicators are demonstrated in a consistent and sustained manner.
6	All behavioral indicators are adequately demonstrated and all work results meet expectations and/or requirements.
5	Most behavioral indicators are adequately demonstrated and most work results meet expectations and/or requirements.
4	Most behavioral indicators are demonstrated but work results still need refinement.
3	Some behavioral indicators are demonstrated.
2	Limited behavioral indicators are demonstrated.
1	No behavioral indicator is demonstrated.

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Social Welfare and Development. 2014. *Guidebook on Organisational Assessment: Framework and Tools*. Manila.

Appendix 1 has a sample opportunity-based LNA survey instrument while Appendix 2 has a sample performance gap-based LNA survey instrument .

Now what?

Steps 9 and 10 synthesize and make sense of the collected data so that responsive recommendations can be developed. These involve recognizing patterns and trends in responses, to identify priority competency gaps among target job or role performers. The final output is a report highlighting these gaps and recommended learning interventions.

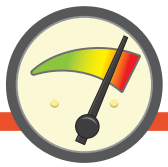
Some questions to ask

What competencies are not adequately demonstrated by majority of the job or role performers?

What specific behavioral indicators (under each competency) need improvement?

Which of the competencies or behavioral indicators need priority attention?

What learning interventions can best address the competency gaps?



In determining what competency gaps should be addressed immediately, the Seriousness–Urgency–Growth Potential[13] framework may be applied (Figure 15).

Figure 15: Seriousness–Urgency–Growth Potential Framework

Seriousness	• What are the current negative effects of the competency gap on – Achievement of performance targets? – Service to clients? – Organization or project image? – Costs? – Team members?
Urgency	• How much time does the organization have to address the competency gap before action becomes irrelevant? • Any set deadline?
Growth Potential	• What will happen if this competency gap is not addressed now? • Will this concern be bigger if not attended to immediately?

Source: C. Kepner and B. Tregoe. 2013. Situation Appraisal. *The New Rational Manager*. Princeton, New Jersey: Princeton Research Press. http://www.kepner-tregoe.com/linkservid/5A2FCDBC-0657-EFFE-41F4DDB33BD60C6F/showMeta/0/.

Determining the Most Appropriate Solutions

The LNA will generate the learning needs of job or role performers so they can better function; or validate if a performance problem is caused by a competency gap that can be addressed by learning and development interventions. It can also generate information on the most appropriate solution or combination of solutions.

The 70-20-10 learning model suggests that a formal training program has less contribution to the individual's overall learning. Yet, it is considered costlier compared to other workplace learning solutions like mentoring, coaching, shadowing, etc., which are supposed to have more impact on learning. It is therefore important to have a clear basis for recommending a training intervention.

A cost–benefit analysis computes the projected return on investment (ROI) and can help determine if training is a viable solution. Table 6 provides one formula that can be applied.

[13] C. Kepner and B. Tregoe. 2013. Situation Appraisal. *The New Rational Manager*. Princeton, New Jersey: Princeton Research Press. http://www.kepner-tregoe.com/linkservid/5A2FCDBC-0657-EFFE-41F4DDB33BD60C6F/showMeta/0/.

Table 6: Sample Return on Investment Formula

Items	Monetary Value
A. Performance before training	₱
B. Performance after training	₱
C. Potential cash flow benefit (A-B)	₱
D. Less cost of training design and development	₱
E. Less cost of training implementation	₱
F. Less lost wages	₱
G. Less lost productivity	₱
H. Total training investment (D+E+F+G)	₱
I. Net cash flow benefit (C-H)	₱

Source: M. Kelly. *Training Cost Benefit Analysis*. http://migashco.com/cambrian/Training_CBA.html (accessed 20 January 2018).

In this formula, potential cash flow benefit is defined as an increase in revenue generation or decrease in costs. ROI is a financial metric, and thus most applicable when values of productivity and other benefits are quantifiable and readily available.

In 2009, James Kirkpatrick offered another way of gauging the value of learning and development interventions by using return on expectations (ROE), instead of just financial metric. Kirkpatrick considers ROE as a "holistic measurement of all of the benefits (both qualitative and quantitative) realized from a program or initiative brought about through a package of interventions, with formal training typically being the cornerstone."[14]

In determining the projected ROE, expectations of key stakeholders are clarified and translated into observable and measurable organizational or program outcomes. Determining the projected ROE helps pin down the learning results chain of the planned training intervention to check whether it is worth the investment.

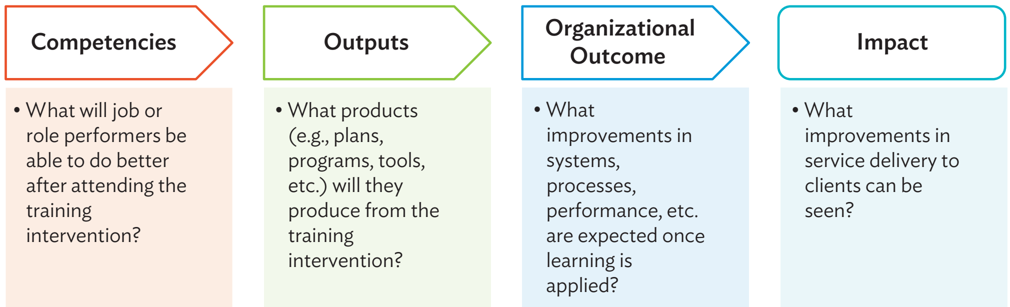
The set of questions in Figure 16 can guide the process of determining the learning results chain.

Aside from the projected ROE, the following are conditions that merit the design and conduct of a formal training program over other learning and development interventions:

- The learning need is present among a considerable number of job or role performers.
- Learning objectives can be realistically met within a short period of time.
- Learners need to interact with others (subject matter experts, facilitators, and co-learners) to optimize learning and produce outputs.
- Pulling out learners from their natural workplaces or environments is important so they can focus on the learning process.

[14] C. Stawarski. 2012. What's the Difference Between Return on Expectations and Return on Investment? *Association for Talent Development*. 8 October. https://www.td.org/Publications/Blogs/L-and-D-Blog/2012/10/Whats-the-Difference-Between-Return-on-Expectations-and-Return-on-Investment#disqus_thread (accessed 30 June 2017).

Figure 16: Determining Learning Results Chain as Basis for Return on Expectations



Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility. 2016. *REAP It! Nurturing and Harvesting Gains from Re-Entry Action Plans through Monitoring and Evaluation*. Manila.

Preparing a Learning Needs Analysis Report

A primary consideration in preparing the LNA report is the audience and user of the document, i.e., top management, line managers and supervisors, and the training team. A concise and data-driven report, supported by tables and charts that capture data in easy-to-read and meaningful formats, will help them appreciate the LNA process and results. Table 7 details the key elements of an LNA report.

Table 7: Key Elements of a Learning Needs Analysis Report

Elements	Items
Background and Rationale	• Context of LNA (may include reform agenda, performance goals and gaps) • Purpose and specific objectives
Scope	• Level of learning needs analysis • Focus (performance and competency areas, target job and/or role performers)
Methodology	• Methods and sources • Tools • Respondents, including sampling
Key Findings	• Competency gaps, including specific behavioral indicators • Priority competency gaps
Recommendations	• Training interventions • Other learning interventions • Other nonlearning interventions

LNA = learning needs analysis.

Source: National Program Management Office, Department of Social Welfare and Development *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project. DSWD Learning Needs Analysis Report Template. Manila. Unpublished.

An LNA Report template is provided in Appendix 3.

IV

Training Design

This module of the Training Management Guidebook will
- discuss the value and purpose of training design;
- identify key steps in training design;
- explain levels, components, and process of formulating learning objectives;
- discuss considerations in selecting and organizing training content;
- differentiate various inductive and deductive training delivery methodologies;
- explain considerations in determining training resource requirements; and
- explain purpose and elements of a training monitoring and evaluation plan.

Value and Purpose of Training Design

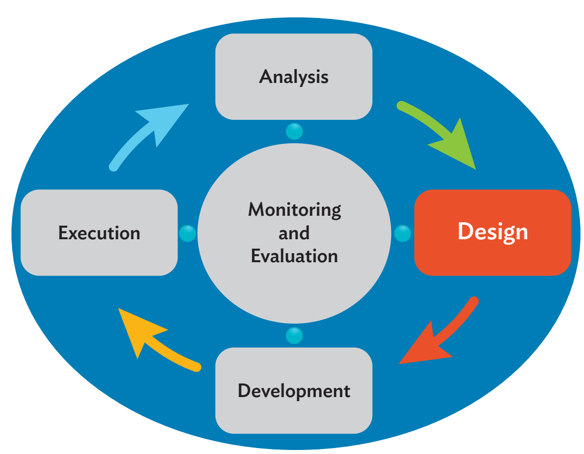
Training design is the second phase in the training management cycle. It is carried out after the learning needs analysis (LNA) confirms that there is a competency gap among target job or role performers that can be reasonably addressed by a training intervention (Figure 17).

It establishes the foundation (i.e., learning objectives and evaluation approach) and maps out the detailed structure (i.e., content, methodologies, pacing, and resource requirements) of the training intervention. The detailed training design becomes the blueprint that will guide the training team in developing materials, executing, and monitoring and evaluating the intervention.

Specifically, the training design phase

- validates and formulates the learning objectives for the training intervention,

Figure 17: Training Design



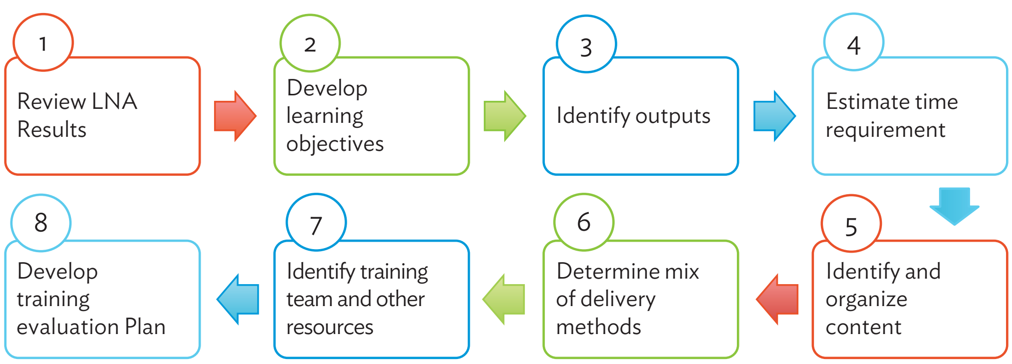
Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

- establishes the monitoring and evaluation levels and approaches that will be adopted,
- identifies the breadth and depth of content and most appropriate way to organize this,
- selects the mix of training delivery methodologies that will best facilitate learning, and
- identifies the training team and other resource requirements to support the execution of the intervention.

Key Steps in Training Design

The training design process starts with reviewing the results of the learning needs analysis to ensure the responsiveness of the output in addressing the identified competency gap. Steps 2 to 7 in Figure 18 flesh out the foundation and structure of the design, leading to the preparation of a detailed training activity plan. The design phase likewise includes the development of a training evaluation plan, an activity that is often neglected and most of the time thought of during, or even after the execution of the training program.

Figure 18: Key Steps in Training Design



Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of and Highways. *Learning and Development Guidebook*. Manila.

Reviewing Learning Needs Analysis Results

A review of LNA results will provide a clear basis for the design process, and should provide the designer with answers to the following questions:

What is the context of the training program?

- To what performance area will this training program contribute?
- What specific performance targets are expected to be positively affected once learning acquired from training is applied?
- What processes and/or systems are expected to be developed and/or enhanced as a result of learning application?

What competencies will this training program address (develop or enhance)?

- What specific behaviors should be the focus of the program?
- What proficiency level is required?
- What should target learners be able to do by the end of the program?
- What outputs should learners be able to produce by the end of the program?

Who are the target learners?

- What offices, units, or communities do they come from?
- What are their positions or roles in the organization or community?
- What is the group size?
- What is the age profile?
- What is the gender profile?
- What is the preferred medium of instruction?

It is possible that LNA results will not yield the profile of specific target learners for the training program because of the sampling used during the LNA. In this case, this data set will have to be assembled as input to the design process.

Developing Learning Objectives

Learning objectives are directly linked to the competencies that need to be developed, and thus the anchor of the training program. They inform the substance and configuration of the training design.

Learning Results Chain

As briefly discussed in the module on LNA (p. 12), developing the learning results chain helps ensure that training investment contributes to performance and organizational results, and reaps the expected return on expectations (ROE). The learning results chain is an important reference in developing the training program's learning objectives.

Figure 19: Sample Learning Results Chain

Competency	Outputs	Outcome	Impact
• Designing training programs	• Training designs that are responsive to identified learning needs of target job or role performers, including detailed training activity plan	• ACTs highly proficient in providing responsive training interventions to clients • Communities and LGUs of poor municipalities assisted to work more collaboratively and to exercise more inclusiveness and good governance in local KC priority setting, planning, and implementation	• Communities in targeted poor municipalities are empowered to achieve improved access to sustainable basic public services, and to participate in more inclusive LGU planning and budgeting

ACT = Area Coordinating Team, KC = KALAHI-CIDDS, LGU = local government unit.

Source: National Program Management Office, Department of Social Welfare and Development *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Project.

IMPORTANT REMINDERS!

- Learning objectives are formulated from the competency element of the learning results chain.
- Learning objectives can also be derived from the output element if outputs are to be produced by the participants during the training program.
- Competencies and outputs that are developed as a result of a single training program, once applied, can only contribute to the achievement of outcome and impact level results. Several training and nontraining interventions will be necessary to achieve these results. It is therefore critical that any training program is planned, designed and executed in the context of a reform agenda or organizational performance area to optimize its contribution.
- Learning objectives may be classified according to program or learning unit levels or learning domains.

Program or Learning Unit Levels

There are three levels of program or learning unit objectives: (i) terminal or performance, (ii) enabling or supporting, and (iii) session (Figure 20).

Figure 20: Program or Learning Unit Objective Levels

Terminal or Performance Objective	Enabling or Supporting Objective	Session Objective
Focus is learners' performance	Provides milestones in achieving terminal objectives	Describes what learners will be able to do right after a learning session
Pins down what learners will be able to do by the end of the intervention	Unbundles terminal objective to manageable learning chunks	Further breaks down enabling objectives into smaller learning bites

Source: American Society for Training and Development. 2008. Instructional Design and Implementation. In *ASTD/Infoline: Tips, Tools and Intelligence for Trainers* . Vol. 2. Baltimore, Maryland: ASTD Press.

The following is a sample configuration of training program objectives based on program or learning unit levels.

Sample configuration of training program objectives

Terminal Objective						
Enabling Objective 1		Enabling Objective 2			Enabling Objective 3	
Session Objective 1.1	Session Objective 1.2	Session Objective 2.1	Session Objective 2.2	Session Objective 2.3	Session Objective 3.1	Session Objective 3.2

There is no rule on the number of terminal, enabling, and session objectives. The reference should always be the competency and key behaviors that learners should be able to demonstrate by the end of the program.

Learning Domains

Learning objectives, whether terminal, enabling, or session level, may address any or all of the learning domains in Figure 21.

Figure 21: Learning Domains

Cognitive
- Knowledge and mental skills
- Recall or recognition of specific facts, procedural patterns, and concepts

Affective
- Emotional response to things, people, and events
- Feelings, values, appreciation, enthusiasms, motivations, and attitudes

Psychomotor
- Physical movement, coordination, and use of motor skills
- Measured in speed, precision, distance, procedures, or techniques in execution

Source: D. R. Clark. 1999. Performance Juxtaposition Site. *Bloom's Taxonomy of Learning Domains*. http://www.nwlink.com/~donclark/hrd/bloom.html (accessed 31 July 2017).

A Committee of Educators (chaired by Benjamin Bloom) developed this taxonomy of learning domains in 1956. Further studies and modifications have been made on the taxonomy, but the cognitive, affective and psychomotor domains are maintained. Each learning domain has several categories that reflect the degree of difficulty and complexity of required behaviors to perform a task (Figure 22).

Figure 22: Learning Domain Categories

Cognitive	Affective	Psychomotor
Remembering	Receiving phenomena	Perception
Understanding	Responding to phenomena	Set
Applying	Valuing	Guided response
Analyzing	Organizing	Mechanism
Evaluating	Internalizing	Complex over response
Creating		Adaptation
		Origination

Source: D. R. Clark. 1999. Performance Juxtaposition Site. *Bloom's Taxonomy of Learning Domains*. http://www.nwlink.com/~donclark/hrd/bloom.html (accessed 31 July 2017).

Writing Learning Objectives

In writing terminal objectives, following the Audience–Behavior–Condition–Degree (ABCD) guide helps in ensuring they are clear, specific, measurable, and results-oriented (Figure 23).

Figure 23: Audience–Behavior–Condition–Degree Guide

A Audience	Who are the target learners of the training program?
B Behavior	What new behaviors will be developed in the learners? What will learners be able to do by the end of the training program?
C Condition	What should be present (e.g., information, manual, equipment, tools, policy, etc.) for learners to be able to demonstrate behavior?
D Degree	How well should learners demonstrate the behavior? (e.g., standards of timeliness, quality, quantity, etc.)

Source: American Society for Training and Development. 2008. *Instructional Design and Implementation In ASTD/Infoline: Tips, Tools and Intelligence for Trainers (Volume 2)*. Baltimore, Maryland: ASTD Press.

Sample Terminal Objective Statements

By the end of the 3-day Course on Designing Training Programs, Area Coordinators (A) will be able to design a training program (B) that

- addresses learning needs of community volunteers on project identification and development (C/D), and
- complies with a training design quality checklist (D).

Note that "addresses learning needs of community volunteers on project identification and development," indicates both a condition (availability of LNA results) and degree (i.e., addresses learning needs).

Sample Enabling Objectives

Enabling objectives are the major learning chunks of the training program, and support the achievement of the terminal objective. (Others prefer to use "supporting or module objectives" instead of enabling objectives.)

- explain the value and purpose of a training design,
- explain key elements of a training design,
- formulate learning objectives,
- identify and organize key content areas using most appropriate structure,
- determine most appropriate learning methodologies in achieving learning objectives,
- identify resources needed to support execution of training program, and
- put together design elements in a detailed training activity plan.

Sample Session Objectives

Session objectives support the achievement of enabling objectives. They are the ones reflected in the detailed training activity plan, and are used as basis for identifying content and methodologies of the training program. Below is an example of an enabling objective broken down into session objectives.

Enabling Objective	Session Objectives
Formulate learning objectives	• Explain value of defining learning objectives • Differentiate types of learning objectives • Formulate terminal/performance objectives following ABCD guide • Formulate enabling objectives • Formulate session objectives

Sometimes, an enabling objective is small enough and becomes the session objective. In the previous example, enabling objective 1 (explain the value and purpose of a training design), and objective 2 (explain key elements of a training design) need not be broken down into smaller bite-sized session objectives.)

IMPORTANT REMINDERS!

- Enabling and session objectives need not be formulated following the ABCD guide, but should clearly identify the target behavior.
- Like the terminal objective, enabling and session objectives should always be stated in behavioral terms, and written from the learners' point of view.
- Session objectives may target specific cognitive, affective, and psychomotor learning domains.

Identifying Outputs

Some training programs are designed to provide a venue for participants to produce a particular output by the end of the learning event. These may be in the form of plans, models, designs, recommendations, etc. The components of these outputs are usually produced step-by step, in separate sessions. Some session objectives, especially lower category of learning domains may not yield outputs.

Sample outputs

Session Objectives	Outputs
• Explain value of defining learning objectives • Differentiate types of learning objectives • Formulate terminal objectives following ABCD guide • Formulate enabling objectives • Formulate session objectives	• Terminal objective • Enabling objectives • Session objectives

Estimating Time Requirement

The learning objectives are a major consideration when estimating the time requirement. However, it is also influenced by several other factors. Thus, although listed as the third key step in the design process, estimating the time requirement is actually iterative. The learning domains and degree of difficulty and complexity should be considered. For instance, a session objective focusing on cognitive learning domain at the lowest category (remembering) will need less time to achieve as compared to the highest category of the domain (creating). Session objectives focusing on psychomotor learning domain usually require more time to achieve, as learners need to apply and practice behaviors during the session. Below are the other key considerations when estimating how much time should be allocated to each session.

Key Considerations

- Learners' current proficiency in target competency (e.g., novice) and the expected level of proficiency to be developed
- Outputs to be produced by learners during the session
- Breadth and depth of content to be covered
- Planned delivery methods (e.g., lecture will take less time compared to a structured learning exercise or workshop activity)
- Implementation concerns (e.g., availability of learners, budget, etc.)

Tips in Estimating Time Requirement

- Divide each training day into four, using coffee and lunch breaks as convenient session pauses. (If working on an 8-hour day, each session will be approximately 1 hour and 45 minutes, with a 20-minute to 30-minute coffee break in the morning and another in the afternoon, and 1-hour lunch break.)
- Estimate how much time is needed to achieve each session objective and plot it using a training activity plan template (Table 8).
- Review and adjust time allocation as content and delivery methods are identified.

Training Activity Plan Template

The training activity plan template in Table 8 can be filled up as the steps in the design process are carried out. At the end of the design process, this template should be completely filled out.

Table 8: Sample Activity Plan Template

Terminal Objective: Enabling Objectives:							
Day/ Time	**Session Objectives**	**Module**	**Output**	**Topic/ Content Highlights**	**Method**	**Facilitator/ Resource Person**	**Resources**

Source: Philippines-Australia Human Resource and Organisational Development Facility and Provincial Government of Aklan. *Learning and Development Manual*. Vol. 3. Manila.

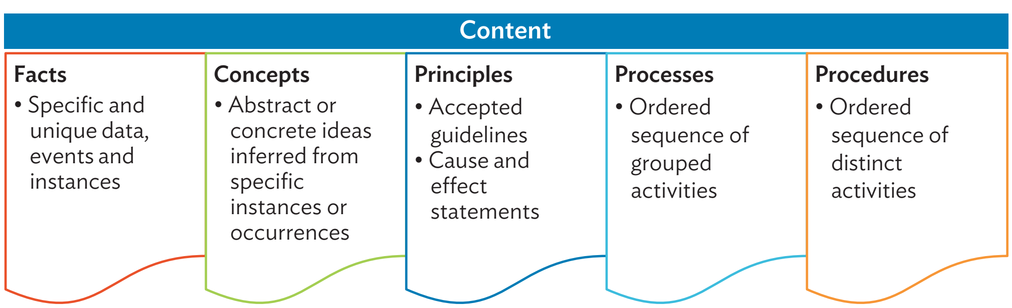
Appendix 4 provides a full-page Training Activity Plan template.

Identifying and Organizing Content

What learners need to know to achieve each session objective will determine the content of the training program. Depending on the objective, content areas can be facts, concepts, principles, processes, or procedures, as shown in Figure 24. These content areas provide learners with important knowledge that will support demonstration of behaviors or application of skills.

Types of Content

Figure 24: Types of Content



Source: D. R. Clark. 2005. Performance Juxtaposition. Learning with Artifacts. http://www.nwlink.com/~donclark/learning/artifacts.html (accessed 31 July 2017).

Prioritizing Content

One challenge that faces training designers is identifying the breadth and depth of coverage, and prioritizing what materials to include in the training program. It can be tempting to load as much as possible in the hope that it might help in the learning process.

The anchor in prioritizing content is always the session objective. Table 9 can be used to assess content.

Table 9: Prioritizing Content

IF MATERIAL...	THEN IT...
Is ABSOLUTELY ESSENTIAL to learner's successful job performance (i.e., learning objective cannot be achieved without it)...	Is VITAL and MUST KNOW item; include it as top priority input
Will CONTRIBUTE SUBSTANTIALLY to learner's successful job performance (i.e., achievement of learning objective can be greatly facilitated by it)...	Is IMPORTANT and NEED TO KNOW item; include it after all VITAL items are covered
Is NOT ESSENTIAL to learner's job performance (i.e., learning objective can be achieved without it)...	Is a NICE-TO-KNOW item; include it only when all vital and important items have been covered and there is time
Has NO SIGNIFICANT CONTRIBUTION to learner's job performance...	Is SUPERFLUOUS, and not included even if there is time May be taken up during session if raised by learners, only if there is ample time

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of and Highways. *Learning and Development Guidebook*. Manila.

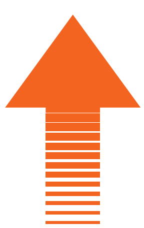
Organizing Content

Organizing content materials of a training program is important as it provides a framework for learning. This involves two tasks: (i) determining the sequence or order in which these will be delivered and (ii) arranging or structuring the relationship of materials.

Sequencing

One common approach in sequencing materials is by progression:

- Problem to solution
- Specific to general
- General to specific
- Concrete to abstract
- Practical to theoretical
- Easier to more difficult
- Familiar to unfamiliar
- Simple to complex
- Past to present to future
- Knowledge to application



The other approach is by job demands, i.e., content areas required for immediate use are learned first before those that are required for later use.

Structuring

Table 10 presents three general ways to structure materials.

Table 10: Structuring Materials

1 - Task-Centered	2 - Topic-Centered	3 - Problem-Centered
• Arranges materials by their relationship to job tasks • Appropriate when there is a specific order in which tasks must be done	• Arranges related topics in blocks • Helpful when learners need to learn a lot of information	• Structures materials around problems learners have faced or will face on the job • Suitable when learners need to learn how to solve problems

Source: American Society for Training and Development. 2008. *Instructional Design and Implementation In ASTD/Infoline: Tips, Tools and Intelligence for Trainers*. Vol. 2. Baltimore, Maryland: ASTD Press.

In most instances, all three structures are used in one training program. Materials can be first structured according to major topics, and then task-centered and/or problem-centered can be applied if appropriate. As always, the reference is the learning objective.

It is MANDATORY that learning objectives are developed first before topics or content materials are identified and assembled. Having it the other way around is just like "putting the horse before the cart."

Determining Mix of Delivery Methods

Goal in Choosing Delivery Methods

There is no one best training method. When selecting which to apply, the goal is to use the most appropriate combination that will support the achievement of learning objectives, and suit the learning styles of participants to facilitate acquisition and transfer of learning.

Classifications of Delivery Methods

There are two broad classifications of training methods: (i) inductive and (ii) deductive (Table 11).

Table 11: Classifications of Training Methods

Features	Inductive	Deductive
Description	• Discovery or inquiry learning • Allows learners to start with an experience, then examine and reflect on it, draw generalizations and insights, and move into arena of action • High engagement of learners and aligned with adult learning cycle	• Direct instruction • Provides learners with accepted principles and generalizations then allows them to draw possible applications • Low engagement of learners and highly dependent on expertise of trainer or subject matter expert
Premise	• Learners' experiences and interactions with phenomena lead to optimal learning	• Highly structured presentation of content leads to optimal learning
Trainer's Role	• Creates venue for learners to be exposed to concrete experiences, observe and analyze, detect patterns and make generalizations, and recognize opportunities for applications	• Assembles and presents information, general concepts and principles, and then provides examples or illustrations • Can later provide learners with tasks where these can be applied
Sample Methods	• Structured learning exercise • Simulation • Role play	• Lecture • Presentation • Panel discussion
Appropriate Uses	• Tapping participants as resource for learning • Drawing out key learning points from learners • Facilitating higher level of ownership of learning process	• Providing new inputs or supplementing learners' knowledge • Presenting alternative perspectives
Challenges	• Requires good choice of learning events or development of new materials • Needs effective learning facilitator • Requires more time and logistics (space, materials, etc.)	• Requires thorough research and good organization of materials • Needs effective presenter or expert • Can be boring

Source: Adapted from C. D. Ortigas. 2008. *Group Process and the Inductive Method: Theory and Practice in the Philippines*. 3rd ed. Quezon City: Ateneo De Manila University Press.

Applying Inductive Methods

The choice of methods to use will have bearing on other design elements like time, training team, and resources.

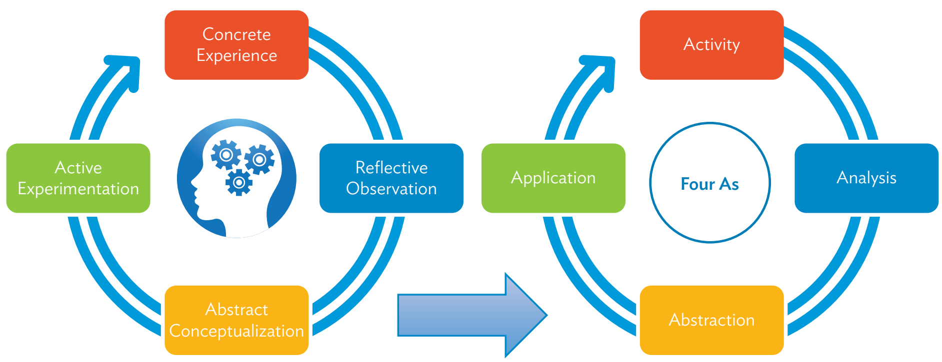
- Deductive methods are more straightforward and trainer-centered as it is the latter who is the source of information. Thus, it is easier to determine how much time is needed to deliver the session. Minimal resources (e.g., laptop and LCD projector) are also required.
- Inductive methods are learner-centered, and the amount of time required to facilitate sessions using these methods is influenced by the learners' responses during the learning activity. Materials needed should also be well planned and prepared in advance.

When determining the amount of time a particular inductive learning event will require, estimate how much time is needed for each of the following tasks:

(i) Administration of the activity (includes instructions to participants)
(ii) Actual activity
(iii) Processing of activity
(iv) Presentation of conceptual inputs
(v) Opportunity for immediate application, if applicable

Inductive methods like structured learning exercises are aligned with the adult learning cycle, and are most effective when applied using the Experiential Learning Cycle model as framework for administration and processing (Figure 25).

Figure 25: From Experiential Learning Cycle Model to the Activity–Application–Analysis–Abstraction Model



Source: Adapted from Philippine Regional Municipal Development Project and Department of the Interior and Local Government. *Training Management System Manual in Local Government Units.* Manila.

A convenient way of remembering this is using the Four As model (Table 12). (Facilitating inductive activities using the Four As model will be discussed in detail in the module on Execution on p. 55.)

Table 12: Key Tasks in Facilitating Inductive Learning Activities

ACTIVITY (Concrete Experience)	**ANALYSIS** (Reflective Observation)	**ABSTRACTION** (Abstract Conceptualization)	**APPLICATION** (Active Experimentation)
• Administration of activity • Actual activity where participants perform tasks according to instructions	• Start of processing of activity • Participants are engaged in looking back at the activity to surface experiences	• Part of processing • Participants share insights and learning from activity • Trainer provides additional inputs	• Part of processing • Participants identify how they can apply learning to workplace

Source: Development Academy of the Philippines. 1987. Towards being on Effective Group Facilitator. A Documentation Study of the First Facilitator's Training Workshop. Unpublished.

Appendix 5 contains common delivery methods and their applications.

Identifying Training Team and Other Resources

The Training Team

Part of the design process is identifying who will do what during the execution of the training program. The key roles include the following:

- Overall program manager
  - orchestrate and monitor all activities and processes;
  - coordinate with subject matter experts and learning facilitators regarding participants' profile and training objectives, content, and activities;
  - collaborate with resource persons and learning facilitators on participants' learning progress; and
  - ensure that administrative concerns are efficiently and effectively attended to.
- Resource person or subject matter expert
  - develop training materials and learning aids (e.g., handouts, worksheets, etc.),
  - provide inputs during learning sessions, and
  - respond to participants' concerns and questions related to assigned session(s).
- Learning facilitator
  - develop and/or prepare materials for planned learning activities and
  - administer and facilitate learning activities.
- Coordinator
  - manage welfare concerns (e.g., meals, accommodation, transportation, etc.) of participants and learning team and
  - ensure that supplies and other logistics are available as needed.
- Documenter
  - document training program proceedings (including content highlights, learning activities, and participation) and
  - compile and organize all training-learning materials (presentation, handouts, worksheets, evaluation forms, etc.).

Given resource constraints, it is sometimes necessary that training team members do multitasking. What is important is that no tasks are falling through the cracks, and achievement of program objectives is not sacrificed.

Other Resource Requirements

- Audio-visual equipment
- Participants' kit (notebook, pen, name tag, etc.)
- Training aids (presentation materials)
- Learning aids (worksheets, handouts)
- Supplies

Appendix 6 contains a Training Logistics Checklist.

Developing Training Evaluation Plan

Evaluating the training programs needs to be planned as early as the design phase, as certain evaluation elements have to be embedded in the training activity plan. (There will be a more detailed discussion of training evaluation in the module on monitoring and evaluation on p. 64.)

The elements of a training evaluation plan are shown in Figure 26.

Figure 26: Training Evaluation Plan Elements

Levels of evaluation	Evaluation objectives	Indicators	Types of evaluation	Methods/ Tools	Data sources	Responsible person(s)	Timeline

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Provincial Government of Aklan. *PG Aklan Learning and Development Manual*. Vol. 2. Manila.

Table 13 shows a sample Training Evaluation Plan.

Table 13: Sample Training Evaluation Plan

Title of Training Program:

Date of Conduct:

Evaluation Level	Objectives	Indicators (What will be evaluated or measured?)	Evaluation Type	Methods/ Tools	Data Sources	Timeline	Responsible Person(s)
Level 1: Reaction	Identify areas for improvement in the training design and conduct	Effectiveness of learning environment Achievement of training program objectives	Formative	Freedom Wall Daily Feedback Climate Check Observation	Learners Training team	During program conduct	Program Manager Facilitators
			Summative	Postprogram Evaluation Form	Learners	End of program	Program Manager
Level 2: Learning	Determine improvement in learners' level of knowledge	Advancement in knowledge (and skills, if appropriate)	Formative	Quizzes Exercises Management of learning activities Evaluation of learners' training outputs	Learners Learners' training outputs	During program conduct	Program Manager Facilitators
			Summative	Pretest and Post-test Evaluation of learners' outputs	Learners Learners' training outputs	Start and end of program	Program Manager

continued on next page

Table 13 *continued*

Level 3: Application	Evaluate workplace learning application	Improvement in learners' work outputs and performance as a result of application of new competencies Results of Personal Action Plan implementation	Summative	Review of Personal Action Plan implementation Review of work outputs	Learners Learners' supervisors Work outputs Personal Action Plan implementation report	One month after program	Program Manager with Supervisors
Level 4: Results	Evaluate impact on organizational processes and service delivery	Improvement in specific processes and service delivery where learning is applied	Summative	Review of work processes Survey on service delivery	Documents Supervisors Users of work processes Clients	Three months after program	Program Manager with Supervisors

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Provincial Government of Aklan. *PG Aklan Learning and Development Manual*. Vol. 2. Manila.

Appendix 7 presents a Monitoring and Evaluation Plan template.

V

Development

This module of the Training Management Guidebook will
- discuss the value and purpose of materials development,
- identify key considerations in developing training–learning materials,
- differentiate types of training–learning materials, and
- discuss guidelines in preparing presentation materials.

Value and Purpose of Materials Development

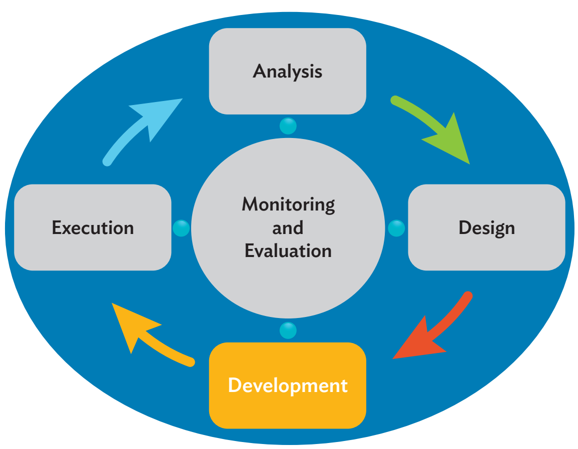
All forms of learning are linked to learners' interactions with people (trainers and co-learners), the training content, and training-learning tools and materials (Figure 27). This phase will ensure that essential content will be covered thoroughly, and learning activities will be administered efficiently and effectively, with the use of well-planned and developed audio-visual aids and materials.

Training and learning tools and materials facilitate the learners' acquisition of knowledge and skills during training and beyond.

Specifically, they are used to

- support delivery,
- present information,
- clarify and expand concepts,
- model task or behavior,
- gain and hold learners' interest,
- encourage participation,
- improve retention, and
- aid application during and after training.

Figure 27: Materials Development



Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

Two Key Tasks

Materials development involve the following important tasks:

(i) fleshing out the content and learning activities (these are usually captured in a session guide); and
(ii) planning and preparation of training and learning materials that will be used during the delivery, monitoring, and evaluation of the training program, as well job aids (e.g., worksheets, templates, etc.) that participants can bring to the workplace to facilitate application.

Session Guide

A session guide outlines the detailed content and process that the trainer will follow to achieve the learning objectives of a training session. It aids the trainer in preparing for the session by thinking through, researching on, and documenting key content areas or core messages that will be delivered, and how activities will be administered and facilitated.

A session guide is particularly helpful

- in conducting new training programs;
- in delivering complex or highly technical programs; and
- when training programs are delivered repeatedly, and conduct needs to be standardized.

The main reference for preparing a session guide is the training activity plan (TAP), which is an output of the design phase. Refrain from shortcutting or entirely skipping the design phase, and going straight into developing a session guide.

Session Guide Elements

Table 14 presents the salient elements of a session guide.[15]

[15] Philippines-Australia Human Resource and Organisational Development Facility and Provincial Government of Aklan. *Learning and Development Manual* (Volume 3). Manila, Philippines

Table 14: Session Guide Elements

Time	Session Objective	Learner's Output	Trainer's Objective	Content Outline	Activity Flow	Materials
Session schedule and duration (From TAP)	What learners will be able to do by end of session (From TAP)	What learners will produce by end of session (From TAP)	What trainer needs to do to meet learning objective	Specific content (facts, concepts, etc.) to be delivered	Specific activities or exercises and how trainer will administer	Supplies and learning aids needed for each session (From TAP)
Example: 8:30 a.m. to 10:00 a.m.	Example: Differentiate learning domains	Example: None	Example: Deliver lecture on learning domains Administer exercise on differentiating objectives by learning domains	Example: Learning domains • Background • Application • Cognitive - Definition - Categories • Affective - Definition - Categories • Psychomotor - Definition - Categories	Example: Activity: Differentiating objectives 1. Divide class into four groups 2. Flash learning objectives one by one 3. Ask class to identify domain covered by objective 4. Give token prize to group with the most correct answers	Example: Slides on Learning Domains Slides on learning objectives Token prize

TAP = training activity plan.

Source: Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

Preparing Session Guide

Figure 28 outlines the steps in developing a session guide.

Figure 28: Steps to Preparing a Session Guide

1
- Refer to training activity plan. Plot time, session objective, output and materials on the session guide template.

2
- Review session objective and output/s, and formulate the trainer's objective. Ensure that this responds to the session objective (i.e., what trainer will do is appropriate and sufficient to achieve the session objective).

3
- Prepare detailed outline of the content for each session objective. (The input of a subject matter expert is usually needed to do this, if the designer is not one.) Ensure that vital content areas are prioritized and allotted more time.

4
- If a structured learning event or any inductive method will be applied, visualize how it will be administered. Outline flow of activity from instruction to processing.

Source: Adapted from Philippines-Australia Human Resource and Organisational Development Facility and Provincial Government of Aklan. *Learning and Development Manual*. Vol. 3. Manila.

Types of Training–Learning Materials

The most common materials that are used in training programs are presentation slides, which are developed with different computer programs and applications. Nonetheless, there is actually a range of training–learning materials and tools that can be used, ranging from what is referred to as low-tech (does not use technology) to high-tech (developed and applied using technology). Usually, low-tech materials and tools require less development and preparation compared to high-tech ones.

The following list shows a sample training–learning materials grouped according to level of technology use and development needed.

Low → TECHNOLOGY USE → High

Nonprojected/ Nonprinted	Printed and duplicated	Projected display	Audio	Video
Marker boards **Flipcharts**	Handouts Worksheets Pamphlets Manuals	Presentation slides	Music Digital audio file Podcast	Films Video clips Screencast

Low → DEVELOPMENT → High

Nonprojected and Nonprinted or Nonduplicated

- Nonprojected and nonprinted or nonduplicated materials are produced by the trainer (using marker boards or flip charts) during the training conduct itself, and thus do not need prior development. However, the trainer has to plan how to produce them effectively, i.e., what items to "publish" or highlight on the board or flipchart, and how to write them.

Some tips in producing materials using marker boards and flipcharts:

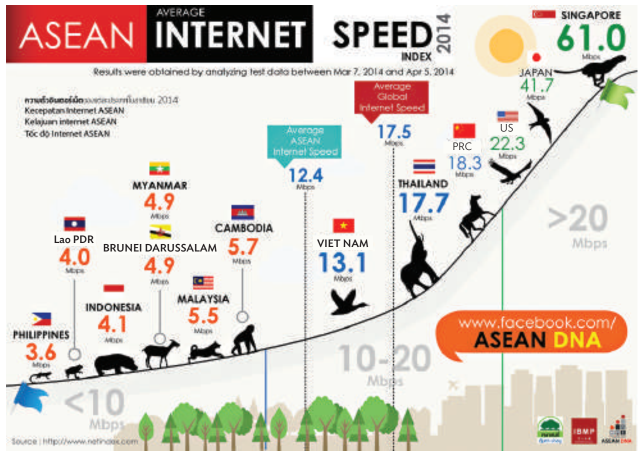
- Start with a clean surface.
- Use dark colored and bold-tipped markers.
- Use red marker only for label or to underscore or highlight words.
- Write key words only.
- Use appropriate labels.
- Leave margins around.
- Write in big letters that are visible up to the room's last row.

Printed and Duplicated

- With the widespread use of presentation software, presentation slides are oftentimes converted into printed material especially since the program has a built-in feature for printing handouts (from two slides to nine slides per page). In some instances, additional references are printed and distributed as handouts.

- Templates and worksheets are helpful in training programs where participants are expected to produce outputs like a plan, analysis, design, etc. Pamphlets and manuals are usually printed and distributed to capture information and processes. Like worksheets and templates, they can be considered as job aids as learners can use them back on the job to support their application of learning.
- Sometimes, the use of infographics is advisable when complex or big amounts of information need to be captured in a concise manner (Figure 29). Infographics use visuals and formats that can make the material more interesting and easier to digest, as compared to a full text format.

Figure 29: Sample Infographic



ASEAN = Association of Southeast Asian Nations, Lao PDR = Lao People's Democratic Republic, PRC = People's Republic of China, US = United States.

Source: ASEAN Briefing. 2014. *Internet Speeds Across ASEAN*. https://www.aseanbriefing.com/news/2014/04/24/internet-speeds-across-asean.html. 24 April.

Instead of printing or duplicating these materials, some organizations provide participants with USB flash drives loaded with the soft copies of reference and information materials. This can be more cost-effective when a big volume of materials has to be distributed, and participants have laptops to access files.)

There are available infographic templates in the internet that make material development simple and easy. There are several free online infographic applications that offer a wide range of templates.

IMPORTANT REMINDER!

Part of the printed and duplicated materials that will be developed are the training–learning evaluation forms that will be used during and/or after the conduct of the training program.

Some tips in preparing printed materials:

- Make sure that presentation slides printed as handouts are readable. Choose format with notes (e.g., one slide or three slides per page) if these are to be distributed during sessions so participants can write on the page.
- Provide sufficient margins and white spaces so material does not appear cramped.
- Incorporate graphs and tables if these will be helpful in presenting data.
- Acknowledge sources.

Projected Display

In most training programs, content is delivered with presentation slides using presentation software. Some of the advantages of using presentation software include ease of

- creating colorful and attractive presentation with use of provided templates and themes;
- organizing complex messages into bullet points, which serve as presentation guide;
- editing content and modifying slide order just before, or even during actual presentation;
- embedding documents, graphics, audio, video, etc. in the presentation because of its integration with other applications; and
- projecting presentation to a large audience.[16]

The ease of use of the software's basic features give rise to the following disadvantages:

- Complex content is sometimes oversimplified or reduced into bullet points that no longer make sense to the learner.
- Some presenters or trainers substitute presentation slides for planning and preparing an organized and substantive presentation.
- There is a tendency for some presenters or trainers to excessively use style features like bullets, animation, transitions, and sounds.
- Presentation slides are used as a crutch, rather than a tool during actual presentation.

Some tips in preparing presentation slides:

- Plan and organize presentation content before preparing slides.
- Keep things SIMPLE: theme, template, and color.
- Avoid fancy fonts; sans serif fonts are easier to read. For example:
  • Arial • Avenir • Candara • Helvetica • Lucida sans
- Avoid excessive use of bulleted text.
- Use maximum of six lines and six words per line for each slide.
- Explore SmartArt feature and use appropriately.
- Leave margins and a lot of white spaces.
- Use high-resolution images.
- Incorporate charts and other graphics.
- Limit use of animations and transitions.

[16] Lumen Learning. *Using PowerPoint and Alternatives Successfully*. https://www.boundless.com.

Audio Materials

Audio materials (like voice or music) are usually embedded in presentation materials and video clips.

Digital audio files of learning materials can also be developed and provided as job aid for learners when they go back to the workplace. These are especially useful for those who prefer listening over reading. Almost everyone uses smartphones, many of which come with voice recorder applications, making it easy to develop audio files.

Digital audio files can also be converted into podcasts to facilitate learners' access to them anywhere and anytime. "A podcast is a digital audio file made available on the internet for downloading to a computer or mobile device, typically available as a series, new installments of which can be received by subscribers automatically."[17] Various free user-friendly software and apps are available online.

There are many available podcasts on a range of topics that can be accessed for free. For example, there are podcast channels on project management, learning and development, strategic thinking, facilitating meetings, etc. Part of the task of the trainer is therefore not to develop the material from scratch, but to identify specific podcasts that can support learning, and refer participants to these online resources.

Some tips in developing and selecting audio files:

- Clarify the objective and key learning points that will be covered by the material.
- Plan and organize the audio content before recording.
- Prepare a detailed script to avoid unnecessary ad lib during recording.
- Practice reading the script to check pacing, volume, and clarity of voice.
- Record in a quiet room; ensure that background noise is nil or minimal.
- In selecting podcasts, ensure relevance to the learning objective.
- Check for clarity of delivery; consider the audience's familiarity with the language (vocabulary and accent).

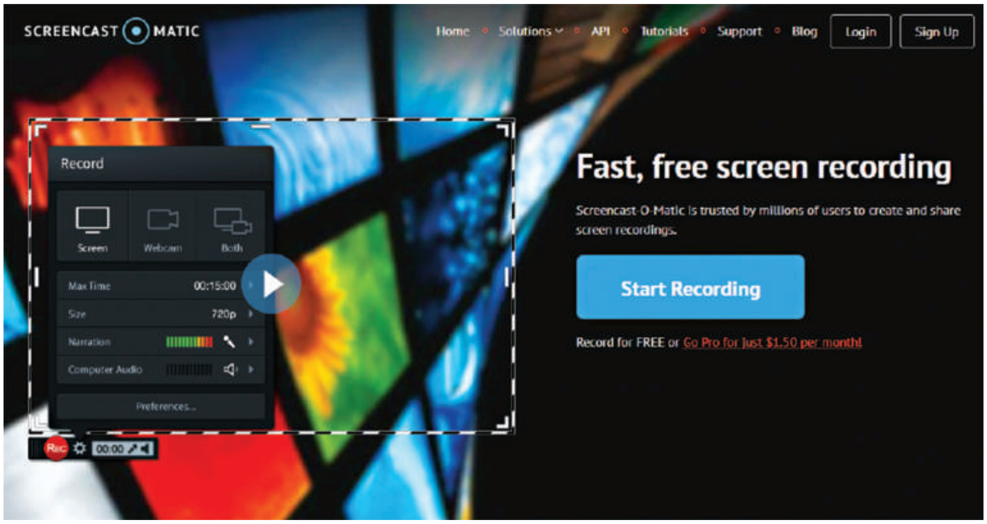
Video Materials

Video materials can be used to capture and present key learning messages, or to prime participants before a major learning session. They can be very effective learning tools especially when learning objectives include the affective domain, and are processed effectively to surface important learning points.

Camera recorders (also referred to as camcorders) produce higher quality video materials compared to digital cameras. Nonetheless, digital cameras and even smartphones can be used to

[17] Oxford Dictionaries. Podcast. https://en.oxforddictionaries.com/definition/podcast.

Figure 30: Screen Capture of Sample Screencast



Source: Screencast-O-Matic. https://screencast-o-matic.com/ (accessed 12 August 2017).

develop video files. There are moviemaking programs or apps that even beginners can use to edit and develop video-based learning materials.[18]

One learning material that is video based but does not require the use of camcorders or digital cameras is a screencast (Figure 30). Also referred to as video screen capture, it is a video recording of the computer screen, and usually includes audio narration.[19] Screencasts are useful learning tools for tutorial sessions (e.g., teaching learners how to navigate a computer program or website).

Like audio files, trainers have the option to develop or to choose from available video files on the internet. A critical task for trainers then is to choose meaningful and relevant video files that will help meet session objectives.

Some tips in developing and selecting video files:

- Clarify objective and key learning points that will be covered by the material.
- Plan detailed video content, flow, and format before recording.
- Be familiar with the gadgets that will be used.
- Get prior permission and arrange schedules if communities, offices, or individuals will be recorded.
- In selecting video files from the internet, ensure relevance to the learning objective.
- Check if the video has a good resolution, clear audio, and of the appropriate length.

[18] G. Siegchrist. 2018. Six Best Free Video Editors. *Lifewire.* https://www.lifewire.com/best-free-video-editing-software-programs-4128924 (accessed 31 January 2018).

[19] L. Ferlazzo. Screencasting. *Tech for Teachers.* https://sites.google.com/a/apps.edina.k12.mn.us/techresourcesforteachers/screencasting (accessed 26 January 2018).

Be mindful that learning materials use inclusive or bias-free language. Ensure that materials do not stereotype or demean people based on personal characteristics, including gender, gender expression, sexual orientation, race, color, ethnicity, physical appearance, economic background, ability or disability status, religion, political affiliation, etc.

Materials for Structured Learning Exercises

The decision to use structured learning exercises (SLEs) to achieve session objectives requires planning, development, and preparation of materials. A structured learning activity should provide a meaningful experience, which when administered and processed effectively can surface key learning points and potentially facilitate change in knowledge, skill, or attitude.

Structured learning exercises can be applied to help meet a wide range of learning objectives related to communication, problem-solving, planning, collaboration, strategic and creative thinking, etc.

Sources of Structured Learning Exercises

There are three main sources of SLEs: buy, borrow, build.

(i) **Buy**. SLEs can be purchased online, there are also available handbooks, trainer resource books, and manuals on SLEs. Most known titles are those developed by J. William Pfeiffer and John Jones.[20]

(ii) **Borrow**. A wide range of SLEs can be accessed and downloaded for free from the internet. Colleagues and fellow trainers can also be a good source. These can be modified or tweaked to ensure relevance to learning objectives.

(iii) **Build**. Trainers may opt to develop original SLEs, especially when the focus of the learning session is quite specialized, and there are no available off the shelf materials.

Considerations in Choosing and Developing Structured Learning Exercises

The SLE material should first and foremost be relevant to the objective of the learning session. It should also be appropriate to the learning style and other characteristics (e.g., age, physical abilities, etc.) of training participants. Materials needed to administer the SLE (including availability of supplies, tools, and other learning aids), as well as space requirement should likewise be considered. Since effective application of SLEs hinges on the ability of the trainer to administer and process the activity, availability of competent trainer is an important factor.

[20] J. W. Pfeiffer and J. Jones. 1980. *The 1980 Annual Handbook of Group Facilitators*. San Diego, California: University Associates.

Elements of Structured Learning Exercises Materials

Structured learning exercises materials are formatted to help the learning facilitator in administering and processing the activities. It has the following elements (footnote 20):

- title,
- theme,
- objective,
- time requirement,
- materials requirement,
- space requirement,
- preparation,
- administering the SLE, and
- processing the SLE.

Please refer to Appendix 8 for a sample SLE material.

VI

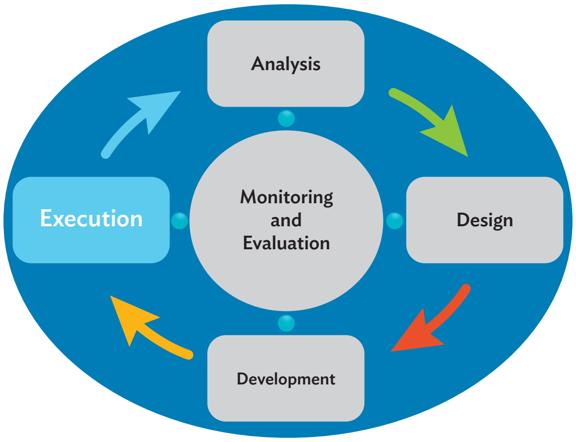
Execution

This module of the Training Management Guidebook will
- discuss the value and purpose of effective training execution;
- explain elements of four key tasks in training execution:
    - program management,
    - team management,
    - resource management, and
    - learning management;
- discuss tips in delivering effective training presentations; and
- explain process of facilitating structured learning exercises using the Four As (Activity-Analysis-Abstraction-Application) framework.

Value and Purpose of Effective Training Execution

This phase in the training cycle involves the actual implementation of the intervention (Figure 31). It applies the training design and the training-learning materials that have been developed to meet the learning needs of participants.

Figure 31: Training Execution



Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

Specifically, effective training execution ensures the following:

- The training program is implemented by the training team as designed.
- The terminal objectives are met and planned outputs are delivered by end of training program.
- The learning progress of participants are tracked and assessed and adjustments in training activities are made to respond to emerging needs.
- The training resources are available and use is optimized and tracked.

Four Execution Areas

Execution covers the following four clusters of key tasks that have to be carried out to provide and manage the environment to support participants' learning journey and achievement of learning objectives (footnote 8):

(i) program management,
(ii) team management,
(iii) resource management, and
(iv) learning management.

The four areas of execution can only be accomplished effectively and efficiently if the training team has done thorough planning and preparation. Execution is really anchored on a robust training design that is responsive to learning needs, well-developed learning materials, sound monitoring and evaluation plan, available resources, and competent training team.

Program Management

Project management involves overseeing the overall conduct of the training program to ensure that all activities are carried out as planned according to design. It also involves ensuring that all emerging needs are addressed.

The key tasks are

- supervising and monitoring delivery of sessions;
- documenting proceedings, outputs, issues, and critical incidents;
- facilitating debriefing sessions with training team at the end of each day to review events, and plan for succeeding sessions;
- responding to emerging needs of participants (e.g., change in pace or methodology) and training team (e.g., request for additional materials), including welfare concerns;
- evaluating training delivery (level 1) and learners' advancement in competencies (level 2); and
- preparing postprogram report.

Team Management

Team management involves partnering and collaborating with training team members, including facilitators and resource persons (both internal and external).

The key tasks are

- clarifying roles and expectations among training team members;
- ensuring that terms of reference and formal invite for facilitators and resource persons are firmed up before start of training program;
- monitoring and documenting performance of training team, including delivery and responsiveness of facilitators and resource persons to learners' needs;
- providing timely feedback to team members;
- ensuring that invited resource persons and facilitators comply with terms of reference, including submission of any expected outputs (e.g., development of materials, submission of materials and reports, participation in team meetings, etc.); and
- celebrating milestones with the team.

Resource Management

Resource management entails mobilizing training resources to support program implementation and ensuring that these are always available and optimized.

The key tasks are

- ensuring quality and availability of training–learning materials and supplies;
- ensuring availability of logistics (e.g., equipment, transportation, venue, etc.);
- coordinating participants and training team's welfare support (e.g., accommodation, meals, first-aid, etc.);
- managing suppliers; and
- monitoring and documenting expenses.

Learning Management

Learning management involves facilitating acquisition of learning by applying the different methodologies in the design, as well as providing mechanisms and opportunities to support participants' learning journey from unfreezing to assimilation to integration. There are three clusters of key tasks under this execution area:

(i) management of learning journey,
(ii) presenting content, and
(iii) facilitating learning processes and events.

Management of Learning Journey

Participants undergo three major learning phases when attending a training program:

- **Unfreezing or preparing for learning**. During this phase, learners can be unsure why they are attending the program, what will be required of them, and what is in it for them.
- **Assimilation**. Participants are exposed to a stream of inputs and learning activities, which can be challenging to absorb and make sense of.
- **Integration**. Toward the end of the training program, participants are equipped with new knowledge, perspectives and skills, but may be uncertain about how to apply these to the workplace.

To support participants in managing their learning journey, Table 15 lists the trainer's key tasks for each phase.

Table 15: Key Tasks in Management of Learning

Unfreezing	Assimilation	Integration
• Preparing and maintaining conducive (nonthreatening) learning climate, including leveling of learning expectations and agreeing on session norms	• Providing opportunities for reflection through management of learning activities • Engaging learners in processing learning • Monitoring learners' progress along learning objectives	• Facilitating planning for reentry to and application of learning in the workplace • Collaborating with supervisors for follow-through mechanisms

Source: Adapted from R. Aylward. 2018. The Three Phases of Learning. *International Proceedings of Economic Development and Research*. Vol. 47. http://www.ipedr.com/vol47/007-ICERI2012-S00009.pdf.

A sample for the management of learning activities is in Appendix 9.

Presenting Content

During the execution of training programs, delivering effective presentation is important especially when a lot of content has to be covered using deductive methods. Effective delivery depends a lot on the trainer's thorough planning and preparation. Equally important though is the actual presentation. Figure 32 contains guidelines in delivering presentations.

Figure 32: Guidelines in Delivering Presentations

1. Communicating authoritatively

- Show mastery of the subject by speaking with confidence
- Encourage questions and respond appropriately
- Come prepared (including presentation materials)

2. Connecting with learners

- Be friendly and conversational
- Maintain eye contact
- Use appropriate humor

3. Demonstrating physical expressiveness

- Use effective gestures
- Be purposive in moving around the platform
- Come well-groomed in appropriate attire

4. Demonstrating vocal expressiveness

- Use appropriate rate of speech
- Ensure that voice can be heard by people in the last row
- Modulate and vary tone and pitch to prevent monotonous delivery

Source: Lumen Learning. Principles of Public Speaking. https://courses.lumenlearning.com/publicspeaking principles/chapter/chapter-12-vocal-aspects-of-delivery/.

Facilitating Learning Processes and Events

The use of inductive methods like SLEs, as well as the need to respond to adult learning preferences, require trainers to be adept at facilitating learning processes and activities.

As a facilitator, the trainer plays five key roles (Table 16).

Table 16: Five Key Facilitator Roles

Engaging	Clarifying	Gate-keeping	Processing	Synthesizing
• Providing optimum and equal opportunities for participation during discussions and activities	• Providing accurate information • Responding to issues and questions • Addressing confusion	• Using process skills to keep sessions on track • Managing learning tempo	• Helping participants find personal meaning of concepts and learning events	• Facilitating integration of inputs, discussions and activities at the end of learning sessions or modules

Source: Adapted from B. Auvine et al. 1977. *A Manual for Group Facilitators*. Wisconsin: The Center for Conflict Resolution.

The effective application of four fundamental facilitation skills—attending; observing; listening; and questioning—helps the trainer perform these roles (Table 17).

Table 17: Fundamental Facilitation Skills

Attending	
Value	Helps build rapport and connection with learners
Trainer's task	Present self physically in a way that shows attention to learners
Tips	• Face all learners. • Maintain appropriate eye contact. • Remove physical barriers like lectern. • Move toward learners. • Circle room during exercises. • Smile.
Observing	
Value	Enables trainer to visually sense and respond to learners' emerging needs, and take appropriate action
Trainer's task	Watch for cues to gain feedback on how learners are receiving the session
Tips	• Continually scan room visually. • Note learner's facial expressions, body position, and movements. • Observe interaction patterns among learners. • Formulate inference on learners' feelings and reactions. • Take appropriate action based on inference.

continued on next page

Table 17 *continued*

Listening	
Value	Demonstrates that trainer considers learners' perspective as important, thus heightening their engagement
Trainer's task	Obtain oral information from learners and verify if this is understood
Tips	• Stop talking and focus on the learner. • Listen to words being expressed as well as to nonverbal expressions. • Demonstrate nonverbal signs of listening (e.g., nodding, leaning, etc.). • Paraphrase what the learner said and confirm understanding.
Questioning	
Value	Helps trainer assess what learners already know, and provides opportunity for learners to ask questions to fill in knowledge gaps
Trainer's task	Ask questions; handle learners' answers to questions; and respond to learner's questions.
Tips	• Ask clear, challenging, but reasonable questions. • Use open-ended questions to stimulate discussion. • Provide positive reinforcement to learners who give correct answers. • Maintain the self-esteem of those who give incorrect or incomplete answers. • Redirect learners' questions to class to stimulate thinking and participation. • Answer question directly if trainer is the only one who knows answer.

Source: Adapted from P. Ittner and A. Douds. 1988. *Train the Trainer: Practical Skills that Work*. Amherst, Massachusetts: HRD Press.

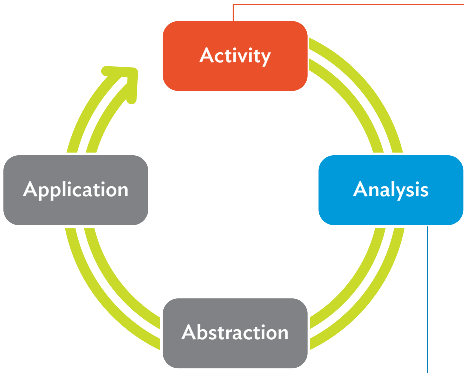
Facilitating Structured Learning Exercises

SLEs are facilitated following the Experiential Learning Cycle model developed by David Kolb. As discussed in Module II, the model posits that learning starts with a concrete experience, followed by reflective observation, abstract conceptualization, and active experimentation.

SLEs can turn out to be just "fun" activities if not properly administered and processed. The key to effective use of SLEs in training programs is facilitation of the process so that learners are guided to have a meaningful experience during the activity, reflect on the experience, and move to the arena of action or application.

The Four As framework is now widely used for ease of recall when administering and facilitating SLEs. (See Module IV, Figure 25, and Table 12.)

Figure 33: Four As Framework



Activity
Trainer's objective: Administer and manage the structured learning exercise so learners are engaged in the activity as planned

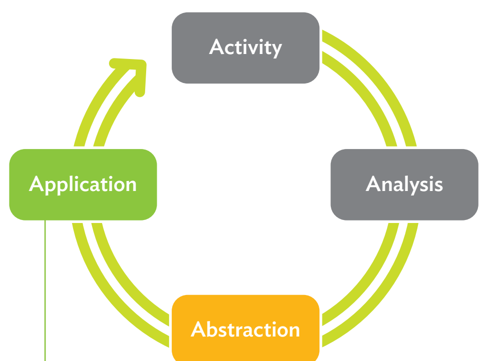
Trainer's tasks:
- Ensure that all materials are ready
- Set up space for activity
- Provide clear and complete instructions
- Attend to safety of learners, as needed
- Observe group process
- Ensure that the "rules" of the structured learning exercises are followed
- Monitor time

Analysis
Trainer's objective: Guide learners in revisiting what happened during the activity and how the experience affected them

Trainer's tasks:
- Ask planned process questions and follow-up questions, as needed
- Ensure that questions are relevant to the structure learning exercise's objectives so that responses can be used as jump-off point to Abstraction
- Engage as many participants in analyzing the event
- Publish learners' responses accurately on easel sheet or board

Abstraction
Trainer's objective: Guide learners in generating insights and conclusions about their experience

Trainer's tasks:
- Ask planned process questions and follow-up questions, as needed
- Ensure that questions are relevant to the structured learning exercise's objectives so that responses can be used as jump-off point to Application
- Summarize responses and synthesize emerging patterns, if any
- Provide additional abstraction points through a presentation or lecture



Application
Trainer's objective: Guide learners in relating training activity to workplace by identifying similar situations, and how learning can be applied to real life scenarios

Trainer's tasks:
- Ask planned process questions and follow-up questions, as needed
- Encourage articulation of concrete and doable application
- Summarize responses and synthesize emerging patterns, if any
- If appropriate, engage participants in action planning

Source: Development Academy of the Philippines. 1987. Towards being an Effective Group Facilitator: A Documentation Study of the First Facilitator's Training Workshop. Manila. Unpublished.

Effective training execution is not about how powerful a speaker the trainer is. It is not about how flashy the presentation slides are, nor how much fun the activities are.

It is about how responsive the training is to the participants' learning needs, and how resources are optimized to support training delivery. It is about how learners are guided and supported throughout their learning journey, and how they are prepared for reentry to their workplace or community.

VII

Monitoring and Evaluation

This module of the Training Management Guidebook will
- discuss value and purpose of training monitoring and evaluation,
- differentiate monitoring from evaluation,
- explain Kirkpatrick's Four Levels of Training Evaluation, and
- discuss monitoring and evaluation methods and tools.

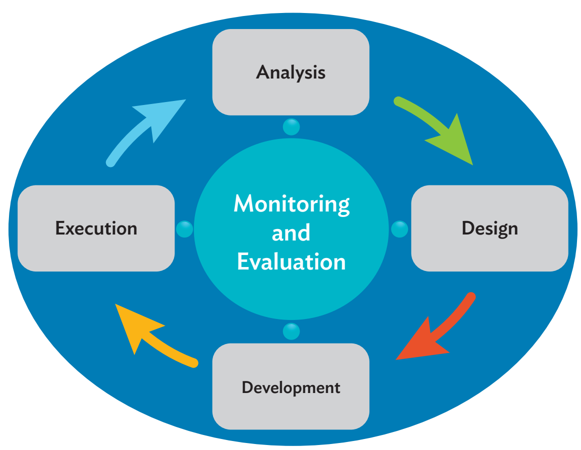
Value and Purpose of Training Monitoring and Evaluation

Training monitoring and evaluation (M&E) involves tracking and analysis of the processes and results of the different phases of the training management cycle (Figure 34). It helps ensure that the different phases are carried out effectively and efficiently, and that training investment yields the planned results from the interventions.

Monitoring and evaluation

- reinforces accountability for carrying out the different phases of the training management cycle,
- fosters continuous improvement and results-orientation, and
- increases the probability of meeting learning objectives

Figure 34: Monitoring and Evaluation

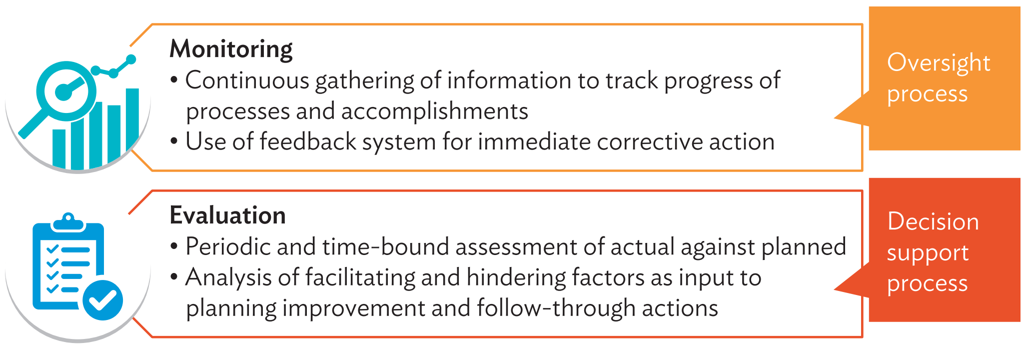


Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

Differentiating Monitoring and Evaluation

Figure 35 illustrates the differences between monitoring and evaluation.

Figure 35: Differences between Monitoring and Evaluation



Source: The United Nations Population Fund. 2004. *Programme Manager's Planning Monitoring & Evaluation Toolkit*. https://www.k4health.org/sites/default/files/migrated_toolkit_files/defining.pdf.

Monitoring and evaluation are closely linked. Both are necessary training management processes to improve execution, accountability and decision making. They use similar methods and tools but yield different kinds of information. Systematically generated and documented monitoring data is essential to successful evaluation.[21]

Evaluation is not a substitute for monitoring; nor is monitoring a substitute for evaluation. Systematically generated and documented monitoring data is essential to successful evaluation.

IMPORTANT REMINDERS!

- Although training M&E is labeled as the fifth phase in the training management cycle, it actually cuts across the first four phases. This is why it is positioned in the middle of the training management cycle diagram. Some form of M&E is done in all the phases to ensure that processes are carried out to contribute to achievement of learning objectives.[22]

[21] United Nations Population Fund. 2004. *Programme Manager's Planning Monitoring & Evaluation Toolkit*. https://www.k4health.org/sites/default/files/migrated_toolkit_files/defining.pdf (accessed 20 October 2017).

[22] American Society for Training and Development. 2008. Instructional Design and Implementation. *ASTD/Infoline: Tips, Tools and Intelligence for Trainers* (Volume 2). Baltimore, Maryland: ASTD Press.

- Key M&E tasks in the ANALYSIS phase:
  - Review of learning needs analysis (LNA) design, sampling, methods, and tools
  - Review of LNA results by subject matter experts (SMEs) and design team
  - Monitoring of process concerns such as timelines and deliverables
- Key M&E tasks in the DESIGN phase:
  - Review of learning objectives vis-à-vis learning needs that surfaced in the LNA
  - Review of training activity plan (e.g., content by SMEs) and design team
  - Monitoring of process concerns such as timelines and deliverables
- Key M&E tasks in the DEVELOPMENT phase:
  - Review of training-learning materials by SMEs and design team
  - Pilot testing and refinement of materials
  - Monitoring of process concerns such as timelines and deliverables
- Key M&E tasks in the EXECUTION phase:
  - Periodic (e.g., daily or after every module) evaluation of participants' learning level and learning environment
  - Full course review based on evaluation of learners and training team
  - Monitoring of process concerns such as timelines and deliverables, including tracking of learners' progress and implementation of training activity plan

Two Types of Training Evaluation

There are two types of training evaluation: summative and formative.[23]

Most trainers are familiar with summative evaluation, which is commonly referred to as post-training program evaluation. It helps determine if the intervention is able to deliver the results it is designed to accomplish, and lead to a final assessment of its value.

A lesser known type is formative evaluation, which is done while a training program is "forming" or taking place. It assesses whether or not the learning objectives are met at specific periods of training implementation (e.g., after a session or module). It is also used to check if conditions in the learning environment (e.g., materials, venue, etc.) effectively support learning. Formative evaluation aids decision making on adjustments needed in the training design and conditions.

Four Levels of Training Evaluation

The four levels of evaluation, also referred to as the Kirkpatrick Evaluation Model, was developed in the 1950s by Donald Kirkpatrick.[24] Over 60 years later, it remains to be the most recognized and widely used model for evaluating training programs.[25] Training managers and learning facilitators sometimes refer to the model as the "gold standard" or the "worldwide standard" for evaluating training programs. Figure 36 illustrates the four levels.

[23] HR.com. 2001. Definitions: Formative versus Summative Evaluation. https://www.hr.com/en/communities/training_and_development/definitions-formative-versus-summative-evaluation_eacx3xgc.html.

[24] Kirkpatrick Partners. The Kirkpatrick Model. http://www.kirkpatrickpartners.com/OurPhilosophy/TheKirkpatrickModel.

[25] D. L. Kirkpatrick, J. D. Kirkpatrick, and W. K. Kirkpatrick. 2013. Four Levels of Evaluation. *Training Industry*. 27 February. https://www.trainingindustry.com/wiki/entries/four-levels-of-evaluation.aspx.

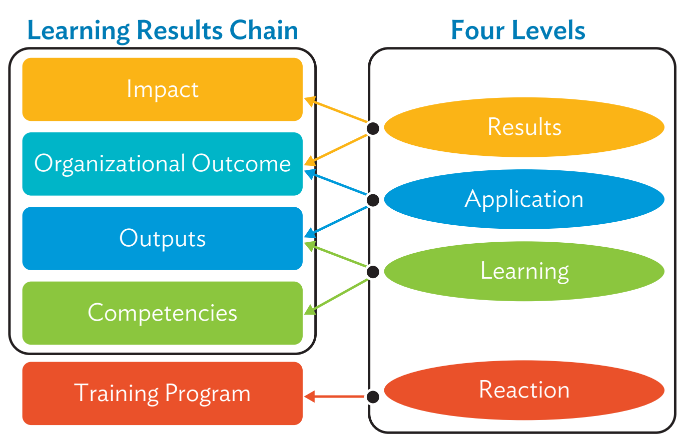
Figure 36: Four Levels of Training Evaluation

Source: Kirkpatrick Partners. The Kirkpatrick Model. http://www.kirkpatrickpartners.com/OurPhilosophy/TheKirkpatrickModel (accessed 20 October 2017).

Figure 37 shows how Kirkpatrick's Four Levels of Evaluation is applied in evaluating the different elements of the learning results chain (discussed in Modules III and IV).[26]

It will be noted though that Level 1 evaluation (reaction) does not apply to any element of the learning results chain, but is applied in evaluating the training program itself.

Figure 37: Evaluating the Learning Results Chain
(using Kirkpatrick's Four Levels of Evaluation)



Source: Adapted from Philippines Australia Human Resource and Organisational Development Facility. 2016. *REAP It! Nurturing and Harvesting Gains from Re-Entry Action Plans through Monitoring and Evaluation*. Manila.

[26] Adapted from Philippines Australia Human Resource and Organisational Development Facility. 2016. *REAP It! Nurturing and Harvesting Gains from Re-Entry Action Plans through Monitoring and Evaluation*. Manila.

It will be very challenging to monitor and evaluate a training program if this is thought of only at the end of the activity. A well-developed learning results chain is the anchor for monitoring and evaluation.

The learning results chain is formulated and planning for monitoring and evaluation is done at the design phase, while monitoring and evaluation tools are prepared during the development phase.

Level 1: Reaction

Figure 38 shows the focus, methods, and timeline for conducting reaction level evaluation.

Figure 38: Conducting Reaction Level Evaluation

What to monitor and evaluate	Clarity of learning objectives	Relevance and adequacy of content	Appropriateness of methodologies
	Appropriateness of timing and pacing	Availability and quality of learning Aids	Effectiveness of delivery
	Level of engagement	Effectiveness of training team's support to learners	Availability and quality of logistics
Ways to monitor and evaluate	**Formative**		**Summative**
	• Use of observation checklist • Use of mechanisms like "Freedom Wall" to encourage timely feedback from participants • Daily debriefing session of training team • Spontaneous oral feedback from participants		• Posttraining survey to get participants' reactions on the training program • Key informant interviews • Focus group discussion • Posttraining debriefing session of training team
When to monitor and evaluate	• During the actual conduct of the training program • At the end of the training program		

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

IMPORTANT REMINDERS!

- Posttraining reaction survey can generate helpful inputs from every participant to improve training design and management, not just from a few unhappy or satisfied individuals.
- The following are effective Level 1 instruments:
    - Focus on items that are salient to evaluating training design and execution.
    - The survey is short, simple, and easy to fill out.

Developing and Using Level 1 Reaction Surveys

The following are tips for developing and using Level 1 reaction surveys:[27]

- Determine items to be included in the survey, focusing on essential points like objectives, content, materials, methodologies, and delivery.
- Include only items that will yield actionable data.
  For example: Asking about the adequacy of room amenities when the training budget can only provide for essentials will only waste the participants' time. Include item like this only if something can be done about it, or the training team is building a case for a bigger training budget to provide for better amenities.
- When using a Likert Scale (box) to collect quantitative data, using a response scale with numbers at regularly spaced intervals and descriptive words only at each end of the scale will address challenges related to overlapping of descriptors (e.g., "Ineffective" and "Somewhat Ineffective" or "Fair" and "Good").
    - Use small numbers at the low or left end of the scale and larger numbers at the right or high end of the scale. This scale captures the natural manner by which we count, and prevents confusion among learners.

The Likert Scale

A Likert Scale is a rating scale used to measure attitudes or opinions, where respondents are asked to rate items usually on a scale of five to seven. Common response anchors are

- Agreement: Strongly disagree to strongly agree
- Frequency: Never to often
- Quality: Very bad to very good
- Likelihood: Never to definitely
- Importance: Unimportant to very important

Source: Statistics How To. What is the Likert Scale? http://www.statisticshowto.com/likert-scale-definition-and-examples/

[27] K. Phillips. 2007. *Eight Tips on Developing Valid Level 1 Evaluation Form.* http://www.kirkpatrickpartners.com/Portals/0/Storage/8_Tips_Devel_Valid_Level1_Evals_article.pdf.

For example:

1	2	3	4	5
Very Ineffective				Very Effective

5	4	3	2	1
Very Ineffective				Very Effective

- Formulate items either as a continuum or a statement. For example:

Continuum How effective are the audio-visual aids used in reinforcing your understanding of the program materials?

1	2	3	4	5
Very Ineffective				Very Effective

Statement The audio-visual aids used during the training program reinforced my understanding of the program materials.

1	2	3	4	5
Strongly Disagree				Strongly Agree

Although positive participant reaction will not ensure better job performance nor learning, participants who are dissatisfied with the conduct of the training program will most likely be less engaged in the learning process. Thus, according to the Kirkpatrick model, every training program should at least be evaluated at Level 1 to facilitate improvement.

Level 2: Learning

Figure 39 shows the focus, methods, and timeline for conducting learning level evaluation.

Figure 39: Conducting Learning Level Evaluation

<table>
<tr><td rowspan="2">What to monitor and evaluate</td><td colspan="2">Achievement of learning objectives</td></tr>
<tr><td colspan="2">Acquisition of new knowledge, skills, and perspectives and/or orientation, as a result of participation in the training program</td></tr>
<tr><td rowspan="2">Ways to monitor and evaluate</td><td>Formative</td><td>Summative</td></tr>
<tr><td>• Management of learning activities (e.g., games, reflection sessions, learning journal)
• Demonstration, simulation or role-play activities
• Quizzes and written tests
• Review of training outputs being developed by participants</td><td>• Pretest and posttest evaluation, which can be written and/or demonstrated
• Review of training outputs developed by participants</td></tr>
<tr><td>When to monitor and evaluate</td><td colspan="2">• At the start of the training program (to establish a baseline)
• During the actual conduct of the training program
• At the end of the training program</td></tr>
</table>

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

Developing and Using Level 2 Tools

A pretest and posttest are the most common tools for Level 2 evaluation. Baseline knowledge or skills level is determined before the start of the training program, and advancement in knowledge and skills is checked at the end of the activity. The following are some tips for developing a pretest and posttest instrument:

- Prepare a test plan as reference for formulating test items (i.e., content and number of items). The following is a sample test plan.

Session Objectives	Topics Covered	% of Items
Explain purpose of training monitoring and evaluation	Purpose of monitoring and evaluating training programs	10
Explain objectives and focus of Kirkpatrick's Four Levels of Evaluation	Kirkpatrick's Four Levels of Evaluation	30
Distinguish effective and ineffective reaction survey items	Guidelines in developing reaction survey	30
Distinguish effective and ineffective pretest and posttest items	Guidelines in developing pretest and posttest items	30

- Decide on the type of test items, i.e., objective or subjective (Table 18).

Table 18: Differences between Objective and Subjective Test Items

Objective	Subjective
• Suitable when learners need to recall essential facts or concepts • Learner selects correct response from several alternatives, supplies word or phrase to answer a question, or completes a statement • Can be true or false, fill-in the blank, matching, or multiple-choice type ○ Multiple-choice items are most reliable, and can measure all levels of cognitive ability, except synthesis and evaluation ○ True or false items make it easy for learners to guess answers • Easy to score, but can take a longer time to develop than subjective test items	• Suitable for testing higher levels of cognitive ability • Learner composes and presents original answer • Can be short-answer or essay type ○ Short answer tests range from recall of exact words or recognition of information, to creation of original responses ○ Essay tests consist of questions so learners can demonstrate ability to recall and organize factual knowledge, and present this in a logical and integrated manner • Can take a shorter time to develop than objective tests, but more difficult to score

Source: Adapted from C. Adriano. 2012. Making a Perfect Fit. Diliman: College of Education, University of the Philippines. Unpublished.

- Test for both recall and understanding.
- Include only items that are based on content to be covered in the program.
- Administer pretest before any content inputs are presented. Inform learners that the same instrument will be administered by the end of the program.
- Involve the learners in checking the test so they will know the correct answers and thus their own performance.

Level 3: Behavior (Application)

Figure 40 shows the focus, methods, and timeline for conducting behavior level evaluation.

Figure 40: Conducting Behavior Level Evaluation

What to monitor and evaluate	Application of new competencies (developed as a result of the training program) in performing tasks and roles in the workplace or community Change in job or role performance of the learner due to application of new competencies
Ways to monitor and evaluate	• Observation and performance monitoring by supervisors • Self-assessment of learner • Progress reports prepared by learners • Results of implementation of learning application plan
When to monitor and evaluate	• Individual performance evaluation • Work process review • Key informant interviews • Usually within 3 months to 6 months after the training program • Monitoring is done immediately once the learner is back in the workplace or community

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

IMPORTANT REMINDERS!

- Level 3 evaluation is very important, as this will determine whether new competencies are used and have yielded improvements in the learner's job or role performance. There is no point in having a very satisfactory Level 1 evaluation, and significantly higher Level 2 (posttest) scores, if the learner is not able to use the new competencies after the training program.
- Doing Level 3 evaluation has some challenges, especially since it is done in the workplace or community, where the training team has little or no control over these constraints:
  - It will be difficult for learners to apply new behaviors if they are not given opportunities.
  - Conditions in the workplace or community (e.g., reward system, culture, etc.) may not be supportive of new behaviors.
- The support of line managers and learners are thus key to effective Level 3 evaluation.

Applying Level 3 Evaluation.

The following are tips for applying Level 3 evaluation:

- Start the groundwork for Level 3 evaluation as early as the learning analysis and design phases. This can be done by involving learners and supervisors in identifying competency gaps and developing the learning results chain.
- Generate buy-in for Level 3 evaluation among learners and supervisors by orienting them on its value to the organization. Consult them on what learning application plan can best facilitate transfer of learning from the classroom to the workplace or community. (Some organizations use a "re-entry" project, which the participant can work on after the training program to jumpstart application.)
- A good learning application or "re-entry" project
  - is directly related to the learner's job or roles,
  - provides opportunities for learners to apply new competencies,
  - is doable within a short period of time (e.g., within 3 months), and
  - is beneficial to both the learner and organization (e.g., will make the learner's work easier and will lead to improved work processes).

Level 4: Results

Figure 41 shows the focus, methods, and timeline for conducting results level evaluation.

Figure 41: Conducting Results Level Evaluation

What to monitor and evaluate	**Change in organizational systems and processes**
	Change in organizational performance (e.g., quality, quantity, timeliness of outputs and/or products)
	Effect on service delivery to organization's clients due to better systems and processes
Ways to monitor and evaluate	• Accomplishment reports • Office performance evaluation • Focus group discussion • Client survey • Onsite validation • Key informant interviews
When to monitor and evaluate	• Usually 6 months (onward) after the training program

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Department of Public Works and Highways. *Learning and Development Guidebook*. Manila.

IMPORTANT REMINDERS!

There are many factors, both internal and external, which affect organizational performance. Thus, it may not be possible to fully attribute change in organizational results and service delivery to a single training intervention. Nonetheless, Level 4 evaluation would be able to identify how the training program could have contributed to these.

Applying Level 4 Evaluation

The following are tips for applying Level 4 evaluation:

- Level 4 evaluation is facilitated when the expected result is clearly defined at the LNA and design phase. The learning results chain should identify the specific organizational area or service delivery area where the training program will contribute.
- Identify indicators that will be measured or evaluated to determine the impact of the training program, using the M&E plan template.
- Use a mix of methods to cross-validate data that will be generated.

Responsibility for Monitoring and Evaluation

Monitoring and evaluation of training programs is a shared responsibility among the training team and the learners' supervisors and/or managers (footnote 8).

The training team's influence and responsibility over the learning process is highly present during the actual conduct of the training program, while that of the supervisors or managers is most visible once the learners go back to the workplace.

The training team takes the lead in preparing the M&E plan, in consultation with the managers and supervisors (especially for Levels 3 and 4).

The training team is likewise responsible for developing the tools for and conducting Levels 1 and 2 evaluation, analyzing results and preparing reports, and communicating these to the learners' managers and supervisors.

The training team works with the managers and supervisors in developing Levels 3 and 4 evaluation mechanisms (e.g., Learning Action Plan or Re-Entry Action Plan, Office Performance Evaluation, etc.) and processes for implementing these. The supervisors and managers would be primarily responsible for monitoring and evaluating application and results. The training team still needs to collaborate with supervisors and managers to ensure this is carried out, and that M&E data are analyzed and used as input to planning and decision-making.

Sample evaluation forms are in Appendix 10.

APPENDIX 1

Sample Opportunity-Based Learning Needs Analysis Survey Instrument

Department of Social Welfare and Development *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Program

Competency Assessment

Position: AREA COORDINATOR

This questionnaire is designed to help you assess your level of competency along identified key competency areas of your position. Data that will be generated will establish your baseline competency and guide the identification of learning interventions that will address your current and future learning needs. All responses will be kept confidential and will not in any way influence your performance evaluation.

Directions:

A. This questionnaire contains behavioral indicators of competencies required for your position. The Department of Social Welfare and Development (DSWD) defines a competency as demonstrable characteristics of a person that enable him or her to do a job very well. It is a cluster of knowledge, skills, and attitudes that are deemed essential for effective job performance.

B. Please be candid in your self-assessment of the behavioral indicators. Do not overanalyze each statement. Please remember that there are no right or wrong answers.

C. Please read each behavioral indicator and choose the description that corresponds to your assessment:
   1 I do not demonstrate this behavior.
   2 I need to improve my ability to demonstrate this behavior.
   3 I can adequately demonstrate this behavior.
   4 I can consistently demonstrate this behavior.
   NA I have had no opportunity to demonstrate this behavior.

D. In the space provided for remarks, please indicate what knowledge, skills, and attitudes you need to acquire to be able to enable you to fully demonstrate the behaviors. Please be guided by the following definitions:

Knowledge : Understanding acquired through learning sessions
Skills : Capabilities acquired through practice
Attitudes : Beliefs, feelings, and values that predispose people to act in certain ways

COMPETENCY/ LEVEL	BEHAVIORAL INDICATOR	RATING					REMARKS
		1	2	3	4	NA	
CORE COMPETENCIES							
1. Commitment to Credible Public Service (Level 2)	Knows how the mandate of DSWD relates to the mandate and programs of local government units and different government agencies						
	Actively seeks information pertinent to the field of social welfare and development to better understand DSWD's mission and vision, social protection framework, primary programs, and key stakeholders and partners						
	Uses prescribed tools and processes to identify routine needs of a target sector, individual, or beneficiaries, and recommends or extends appropriate solutions regularly provided by the agency						
	Directs individuals or groups to other units within the agency, or to institutions who can augment or provide the help needed when such is not within the scope of the DSWD						
	Assists target beneficiary-sectors or individuals in addressing lapses and/or errors to ensure timely receipt of benefits. Refers client problems to higher authority after exhausting resources within his or her authority to address problems						
	Informs target beneficiaries and other co-collaborators of changes that may cause problems with compliance or delay in services and proactively adopts measures to avert these						
	Demonstrates ethical and organizational values in all transactions and dealings						
	Is transparent in all dealings even in difficult or compromising situations. Resists political pressure. Invokes DSWD mission and policies to defuse tension						
2. Delivering Excellent Results (Level 2)	Monitors own progress against targets, identifies cause of own performance gaps, and modifies actions accordingly						
	Gives deliverables ahead of time; works to exceed current expectations						
	Adjusts thinking and behaviors to be in step with new thrusts or changing priorities of the organization. Willingly accepts new tasks and/or adopts new approaches						
	Seeks help to develop own skills to perform tasks at the expected level						
	Explores more effective work processes or methods in own work, and adjusts accordingly to get the job done quickly and effectively						
	Adjusts thinking and behaviors to be in step with new thrusts or changing priorities of the organization. Willingly accepts new tasks and/or adopts new approaches						

COMPETENCY/ LEVEL	BEHAVIORAL INDICATOR	RATING					REMARKS
		1	2	3	4	NA	
3. Personal Effectiveness (Level 3)	Maintains composure and confident demeanor when put on the spot or when facing an intimidating situation						
	Sustains high-energy level and good performance even under adverse conditions and/or crisis situations. Demonstrates grace under pressure						
	Maintains focus in the face of uncertainty, ambiguity, and complexity, and is able to manage other people's reactions to stress						
	Coaches others to demonstrate behaviors that respect and protect the rights of persons, including staff and clients						
	Anticipates and plans for possible delays or complications that will lead to waste of resources						
MANAGERIAL AND/OR LEADERSHIP COMPETENCIES							
4. Collaborating and Networking (Level 2)	Identifies and reaches out to individuals and groups (stakeholders) who will contribute to completion of own work assignments or who will be affected by activities or undertakings of the agency						
	Uses effective team processes (i.e., brainstorming and consensus building) to explore ideas and to arrive at decisions						
	Seeks inputs and recommendations of partners on how the desired outputs can be met. Establishes working norms such as resource sharing and coordination procedures						
	Acts on and/or recommends needed action that will address operational concerns in an effective and timely manner, mindful of different sensitivities and interests						
5. Creating an Environment for Learning and Growth (Developing Others - Level 2)	Recognizes and identifies staff potential and discusses with each one, their development needs and plans, aspirations, and career opportunities						
	Develops an individual development plan for each staff member						
	Implements within one's team a coaching and mentoring system that operates in an environment of trust and mutual desire for development						
6. Engaging and Inspiring Teams (Level 2)	Identifies performance milestones, tracks the team's progress, and provides midcourse recognition or encouragement as the case may be						
	Provides venue for discussion of team concerns, especially those that threaten team cohesion such as interpersonal conflicts, and sees to their speedy and effective resolution						
	Shows trust in the team by consulting them on decisions affecting their work						
	Celebrates the team's achievements, but recognizes exemplary performance of specific individuals						

COMPETENCY/ LEVEL	BEHAVIORAL INDICATOR	RATING					REMARKS
		1	2	3	4	NA	
7. Facilitating Change and Innovation (Level 2)	Learns continuously to ensure that technical skills are kept up-to-date and new methods and technologies that help improve work can be utilized						
	Develops and adopts innovative, flexible, and adaptable solutions to work-related problems or challenges, taking into consideration relevant rules and regulations						
	Communicates to employees and stakeholders the compelling reasons for change initiatives throughout the organization, extolling its benefits and the costs of ignoring it						
	Uses inputs from implementation-level activities to identify which innovations are best for timely application within the work group						
	Identifies the factors and reasons for inability of staff to be engaged in change initiatives						
8. Planning and Organizing (Level 2)	Establishes and aligns individual and group work goals to meet short- to medium-term requirements of own work group in relation to other work groups						
	Executes tasks in a manner that supports the attainment of own work groups' and related work groups' tactical goals						
	Coordinates and monitors the day-to-day work and activities of work groups to ensure that activities and processes of different groups are coordinated and accomplished as expected						
	Administers department resources in a manner that effectively responds to needs of beneficiaries and clients as well as complies with statutory requirements						
	Identifies and proposes areas for greater control and/or the application of economy measures						
9. Problem Solving and Decision-Making (Level 3)	Assesses the validity and urgency of issues and problems against the impact on the deliverables of his/her team, and directs others to take action accordingly						
	Investigates to dig deeper into issues to establish root causes. Develops and/or recommends solutions that address the root cause of the problem to prevent recurrence						
	Recognizes symptoms of an emerging problem and takes action to avert it						
	Makes decisions by weighing a range of factors, some of which are partially defined and entail investigation						
	Identifies risks and/or potential problems and comes up with a contingency plan to mitigate these						

COMPETENCY/ LEVEL	BEHAVIORAL INDICATOR	RATING					REMARKS
		1	2	3	4	NA	
10. Thinking Strategically and Systemically (Level 2)	Supervises unit or office with a focus on long-term solutions and strategies, bearing in mind the interrelationships of units within the agency						
	Develops and aligns the objectives of the unit with DSWD's mission and vision						
	Keeps track of new trends in the technological, socio-economic and political landscapes						
	Advocates or installs a mechanism for aligning operational plans to the strategy and priorities of the agency						
FUNCTIONAL COMPETENCIES							
11. Community Organizing (Level 3)	Gauges the readiness of community and municipal officials in embracing the Community Empowerment Activity Cycle platform, and develops strategies to gain their support and buy-in						
	Mentors volunteers and builds capacities to organize and to articulate and exercise their rights to participate in making decisions that affect their welfare						
	Promotes and mentors the community groups in observing the use of consultative and facilitative techniques in conducting prescribed activities and decision making						
	Actively engages the municipal local government unit, civil society organizations, and other stakeholders to bridge access of communities to institutions or those who are either entrusted with the responsibility for basic services delivery or who have the capacity to assist communities realize their plans						
	Facilitates resolution of conflicts of interest between the community groups and the municipal officials						
12. Group Facilitation (Level 3)	Uses creative ways in presenting agenda and objectives to generate buy-in on roles, processes, and ground rules; and to effectively manage the tasks, processes, and goals of the interaction						
	Evaluates conduciveness of environment and suits it to the objectives of the interaction, needs, and characteristics of participants						
	Listens to and observes participants and adopts appropriate facilitation "mode," depth, and timing when intervening on content or processes						
	Interprets and confirms participants' verbal and nonverbal communication to identify those who need clarification and feedback and use appropriate techniques to probe and expand the discussion, and limit or segue to succeeding topics or issues						
	Uses tact and humor and acts firm but with understanding when managing disruptive behavior						
	Directs questions appropriately and creates opportunities for learners to contribute to the discussion						

COMPETENCY/ LEVEL	BEHAVIORAL INDICATOR	RATING					REMARKS
		1	2	3	4	NA	
13. Mobilizing for Responsive Community-Driven Development (Level 3)	Engages with provincial and regional structures of the local government unit, line agencies and other stakeholders to promote active linkages between these structures and the municipalities to support priorities expressed by communities.						
	Organizes assessment and planning sessions, technical reviews, trainings, technical assistance, and other provincial and regional activities that aim to support the development initiatives of municipalities						
	Interprets policies and provides guidance to municipal teams on how to operationalize framework for convergence						
	Facilitates public–private sector partnerships that aim to reduce poverty in *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services areas						
	Promote sharing of experiences and lessons at provincial and regional level to increase appreciation and support for community-driven development-based poverty reduction initiatives						
14. Project Management (Level 3)	Prepares a work plan using appropriate processes such as work breakdown structure and network diagram, for a major component of a complex project over which he or she has accountability for results. Aligns these with overall project objectives and terms of reference						
	Prepares a resource plan, financial plan, and quality plan for the project component						
	Identifies metrics, standards of performance, critical success factors, and key indicators to monitor and assess results and puts in place a system to track performance against these, and communicates these to individuals and offices involved						
	Puts in place fiscal control, resource management, and quality control mechanisms. Keeps a tight watch on performance against cost, quality, and time, and acts promptly and judiciously to keep to the standards						
	Assists with removing barriers and/or resolves issues that are impeding the progress of project team members						
	Develops procedures and establishes a system such as a project database and project reporting mechanisms, for meeting the information and communication needs of stakeholders						

COMPETENCY/ LEVEL	BEHAVIORAL INDICATOR	RATING					REMARKS
		1	2	3	4	NA	
15. Report Writing (Level 3)	Presents analysis of information presented and able to identify appropriate follow-through actions						
	Captures the efforts exerted and strategies adopted to achieve desired outcome and results						
	Indicates all information that will facilitate better understanding of the gaps, issues, and recommendations presented in the report						
	Anticipates the data or information needed by the management and/or recipient, and capture these on the report						
	Aligns content of the report to the agency policies and guidelines, and thrust and direction of the program						

Sources: Philippines–Australia Human Resource and Organisational Development Facility and Department of Social Welfare and Development. *DSWD Competency Dictionary: Functional Competencies.* https://www.australiaawardsphilippines.org/partners/cpos-and-psps/dswd/2011-2012/HROD%20Plan/Prioritised%20HROD%20Interventions/intervention-2-strengthening-the-recruitment-selection-and-placement-system/uploaded-documents/misc_2/dswd-competency-cards-functional-competencies.pdf.

APPENDIX 2
Sample Performance Gap-Based Learning Needs Analysis Survey Instrument

Department of Social Welfare and Development
Kapit-Bisig Laban sa Kahirapan–Comprehensive and Integrated Delivery of Social Services
National Community-Driven Development Program
Learning Needs Assessment

Name (Optional)	
Position	
Tenure in *Kapit-Bisig Laban sa Kahirapan*–Comprehensive and Integrated Delivery of Social Services or KC-NCDDP (in years)	

This questionnaire is designed to help you specify tasks that you need to perform better to successfully meet or exceed your performance goals or targets. Data that will be generated will guide the identification of gaps in competencies and appropriate learning interventions that will address your current and future learning needs. All responses will be kept confidential and will not in any way be used to assess your performance on the job.

Directions:

A. Please read each of the questions and be candid in responding to them. Please remember that the objective of this survey is to help you improve rather than assess your performance.

B. DSWD defines **competency** as demonstrable characteristics of a person that enable the person to do a job very well. It is a cluster of knowledge, skills, and attitudes that are deemed essential for effective job performance.

In answering the questions, the following definitions apply:

- Knowledge: Understanding acquired through learning sessions
- Skills: Capabilities acquired through practice
- Attitudes: Beliefs, feelings, and values that predispose people to act in certain ways

C. Should you have other learning and development concerns, please write them on the space provided for remarks.

1. What current performance goals or targets are you finding challenging to accomplish?
2. What tasks related to these performance goals have been difficult to perform because of inadequate knowledge, skills, and/or abilities?
3. In subsequent performance periods, are there new goals or targets that you anticipate will be challenging to achieve? Please specify.
4. What specific knowledge, skills, and/or abilities should you develop or enhance to enable you to perform tasks related to these anticipated performance goals or targets?
5. Remarks

-- Thank you for your cooperation. --

APPENDIX 3

Sample Learning Needs Report Template

Learning Needs Analysis Report

I. Background and Rationale

Answer the question: Why was the learning needs analysis (LNA) conducted? (Briefly discuss the context and purpose of the conduct of the LNA.)

II. Scope of the Learning Needs Analysis

Answer the question: What is the coverage and focus of the LNA? (Discuss level of analysis, i.e., organizational, groups or individuals. Identify focus, e.g., specific performance areas and competencies.)

III. Methodology

Answer these questions: How was data collected? What methods and tools were used? What or who are the data sources? What sampling technique was used? (Discuss data gathering process, methods, and tools. Identify data sources, sampling technique, and brief description of respondents. Cite factors that may have affected the results of the study, including limitation in sampling, etc.)

IV. Analysis

Answer these questions: What were the results of the LNA? What do the findings indicate in terms of competency gaps among prospective learners? (Present the data collected: Start with overall level of competency then proceed with a more detailed analysis of competencies. Establish trends or patterns that can be drawn from the data. Highlight priority competency gaps, as these would be the basis for recommendations in the following section. If noncompetency-related factors (e.g., lack of adequate staff, lack of resources, etc.) were identified, present this data as well. However, emphasize that performance problems resulting from these issues are not indicative of a lack of competencies among job performers. Organize data in charts and graphs to make the data easier to understand and analyze. The detailed tabulation of findings can be included as an annex to the report for ready reference.)

V. Recommendations

Answer these questions: How can the competency gaps be best addressed? What interventions would be most appropriate to bridge the gaps? (Recommend strategies to build or enhance competencies among job performers. This may include discussion of implementation concerns like delivery modes, e.g., face-to-face, online; priority target learners; schedules; resources; etc.)

APPENDIX 4

Training Activity Plan Template

Terminal/Performance Objective:

Enabling Objectives:

Day/ Time	Session Objectives	Module	Output	Topic/ Content Highlights	Methodology	Facilitator/ Resource Person	Resources
	AM COFFEE BREAK						
	LUNCH BREAK						
	PM COFFEE BREAK						

APPENDIX 5

Common Delivery Methods

<table>
<tr><td colspan="2">Lecture: A structured presentation, with or without visual aids, aimed at sharing experiences and knowledge including events, theories, facts, concepts, principles, etc.</td></tr>
<tr><td>Advantages:
1. Effective for presenting and explaining ideas, concepts, theories, principles, etc.
2. Can be applied to small and large audiences
3. May be used together with other techniques
4. Audience can benefit from knowledge and experience of lecturer considered as expert in the topic
5. Appropriate for lower-level affective, cognitive, and psychomotor learning objectives (in reference to Bloom's Taxonomy)
6. Time can be controlled by lecturer</td><td>Limitations:
1. Mostly one-way communication thus learner has passive role
2. Inappropriate for higher-level learning objectives (e.g., changing behavior)
3. Engagement of learners mostly limited to the question and answer portion
4. Low retention
5. May be dull and boring, especially when extended and lecturer's style is not engaging
6. Requires intensive preparation (i.e., research and preparation of visual aids)</td></tr>
<tr><td colspan="2">Panel Discussion: Bringing two or more experts from the same or different disciplines in one platform for presentation of views; generally followed by questions from the audience</td></tr>
<tr><td>Advantages:
1. Can provide new perspectives to learners
2. Facilitates bringing together of expertise in one activity
3. Appropriate for management and leadership development programs</td><td>Limitations:
1. Engagement of learners is limited
2. Not suitable for skill-oriented programs
3. Long-term retention may be less
4. Highly dependent on selection of good panelists</td></tr>
<tr><td colspan="2">Demonstration: A visual and action charged presentation to convey how something works or operates (e.g., tool, instrument, machine), or how a specific task is to be accomplished (e.g., filling up a form); learners are then given chance to apply</td></tr>
<tr><td>Advantages:
1. Can stimulate learners' interest
2. Can help in building learners' confidence to do a task
3. Appropriate for developing psychomotor skills
4. Can provide immediate performance feedback to learners</td><td>Limitations:
1. May simplify a real situation in the workplace
2. Learners may develop false confidence from observing or doing a task once</td></tr>
<tr><td colspan="2">Brainstorming: A spontaneous technique for generating innovative and creative ideas and alternatives among learners.</td></tr>
<tr><td>Advantages:
1. Effective for tapping into learners' experiences and expertise
2. Highly engaging, can provide refreshing break and generate learners' interest
3. Allows creative and synergistic thinking (learners can build on each other's ideas)
4. Nonjudgmental and nonthreatening when well facilitated</td><td>Limitations:
1. Synthesis of ideas generated by learners requires competent facilitator
2. If not well-facilitated, session can be dominated by more outspoken or senior members of the group
3. Not all brainstorming exercises can guarantee development of creative and innovative ideas</td></tr>
</table>

<table>
<tr><td colspan="2">Case Method: A real or imaginary yet realistic situation to be studied and analyzed by learners, usually applied in learning sessions on problem analysis, decision making, strategic thinking and human relations</td></tr>
<tr><td>Advantages:
1. Taps participants as learning resource
2. Promotes individual as well as group learning
3. Helps in developing analytical and interaction skills</td><td>Limitations:
1. Can be time-consuming
2. Skilled resource persons needed to write case studies that will provide opportunity to surface key learning points
3. Requires competent facilitator to process and synthesize learning</td></tr>
<tr><td colspan="2">Buzz Group: Small groups of learners (usually two to three) are asked to produce ideas or share perspectives on a narrow or an open-ended topic within a short time limit; sharing of product usually facilitated by trainer in plenary</td></tr>
<tr><td>Advantages:
1. Highly participative
2. Time saving
3. Promotes sharing and building of ideas
4. Applicable for sharing of experiences and best practices</td><td>Limitations:
1. Groups can easily get sidetracked because of the informal conversation
2. Needs a competent facilitator to reinforce and synthesize product</td></tr>
<tr><td colspan="2">Group Discussion: Exchange of ideas among learners (usually four to seven members per group) focusing on specific topics or questions; outputs are typically published and presented by the groups</td></tr>
<tr><td>Advantages:
1. Effective tool for tapping into learners' experiences and expertise
2. Highly participative
3. Provides opportunity for exchange of knowledge and experiences
4. Provides opportunity for demonstration of communication, leadership and interaction skills</td><td>Limitations:
1. Some participants can drop out from the discussion especially if group size is large
2. Some participants can dominate the discussion
3. Needs a competent facilitator to reinforce and synthesize product
4. If not monitored, groups can digress</td></tr>
<tr><td colspan="2">Role Play: Learners assume and depict certain roles in an informal and nontheatrical but realistic manner; may be structured or spontaneous</td></tr>
<tr><td>Advantages:
1. Promotes learning by doing
2. Appropriate for affective learning objectives
3. Appropriate for developing interpersonal and negotiation skills as well as ability to manage stressful and conflict situations
4. Encourages on-the-spot problem solving</td><td>Limitations:
1. Requires good planning of scenarios or situations for role playing
2. Players and the audience may not take roles seriously
3. Role playing can be artificial and/or over simplified
4. Time-consuming
5. Requires competent facilitator to manage and process the activity</td></tr>
<tr><td colspan="2">Workshop: A meeting among small groups of learners with the principal objective of promoting experiential learning and producing specific outputs or solutions to problems</td></tr>
<tr><td>Advantages:
1. Effective tool for tapping into learners' experiences and expertise
2. Highly participative
3. Interesting and absorbing
4. Productive
5. Useful for all levels of participants</td><td>Limitations:
1. Outcomes depend on the quality of participants
2. Can sometimes give rise to simplistic solutions to problems
3. Time-consuming</td></tr>
</table>

Source: Adapted from American Society for Training and Development. 2008. Instructional Design and Implementation. *ASTD/Infoline: Tips, Tools and Intelligence for Trainers*. Vol. 2. Baltimore, Maryland: ASTD Press; and Konrad-Adenauer-Stiftung. 2011. Facilitation Skills and Methods of Adult Education. http://www.kas.de/wf/doc/kas_29778-1522-2-30.pdf?111219190929.

APPENDIX 6

Sample Training Logistics Checklist

Training Logistics Checklist

Program Title	
Implementation Date(s)	
Venue	

Venue		Details	Status
Training Room	• Room layout	* Attach illustration of room set-up * Remember to plan for – Secretariat area and Facilitators' area – Coffee or snack area (if to be served inside room) – Other special areas such as a reading area, gallery viewing area, supplies area, etc.	
	• Break-out rooms	* Number of rooms needed, for when, for what activity and number of participants per room * Attach illustration of room set-up	
	• Audio-visual system	* Number and types (wireless or corded) of microphones needed * When music and video players are needed	
	• Lighting	* Adequacy of lighting	
	• Ventilation	* Temperature control	
	• Comfort rooms	* Location of comfort rooms	
	• Training equipment ▪ Projector ▪ Laptop ▪ Screen ▪ Presenter ▪ Whiteboard ▪ Easel stand ▪ Others	* Equipment needed to deliver planned training sessions; refer to detailed training activity plan to identify these requirements	
Accommodation	• Rooming arrangement	* Sleeping arrangements during training if residential * Attach rooming list	
	• Hotel and room amenities	* Services and facilities available to participants free of charge * Expenses to be charged to participants	
	• Others		

Meals	• Meal requirements	* Meals to be served (AM/PM snacks, lunch, etc.) * Number of participants, training team, guests, etc.	
	• Special dietary needs	* Names of participants, training team members and guest and dietary requirements	
	• Menu	* Food to be served for each meal * Reminder to supplier regarding special dietary needs * Arrangement for flowing coffee or tea	
	• Schedule of serving	* Time for coffee breaks, lunch, and other meals	
	• Meal service area	* Service area or location of coffee breaks, lunch, and other meals	
	• Others		
Venue Reservation	• Reservation for venue	* Name, address of training venue * Name of contractor * Dates reserved	
	• Contract for venue	* Contract fee * Payment schedule	
	• Arrangement for socials	* Venue for socials and set-up * Food and drinks requirement	

Training Aids, Supplies, and Materials		Details	Status
Participants' Kits	• Training kit • Binder • Notebook • Name tag • Pen • Others (e.g., flash drive, etc.)	* Contents of kit * Attach template for the name tags	
Learning Materials and Aids	• Presentation Slides	* Titles of presentations * Attach a template that would be used in developing the presentation slides	
	• Handouts and worksheets	* Titles of handouts and worksheets * Attach template that would be used in developing these materials	
	• Structured learning exercise materials	* Worksheets and supplies needed * Quantity and specification	
	• Other visual aids	* Titles of visual aids * Attach design of visual aids, if to be prepared	

Other Forms	• Attendance sheet	* Format * Level 1 and 2 tools	
	• Registration form		
	• Level 1 evaluation		
	• Level 2 evaluation		
	• Training documentation		
	• Certificate of Participation	* Attach a template for the certificates	
	• Certificate of Appearance		

Supplies and Materials	• Easel sheets	* Quantity and specifications of supply requirements	
	• Cartolina		
	• Copy or bond paper		
	• Colored paper		
	• Markers		
	• Masking tape		
	• Meta-strips or cards		
	• Map pins		
	• Puncher		
	• Paper clips		
	• Stapler and staple wire		
	• Scissors		
	• Cutter		
	• Glue		
	• Folders		
	• Envelopes		
	• Prizes		
	• First-aid kit		
	• Extension cords		
	• Flash or thumb drives		
	• National anthems (audio)		
	• Flag		
	• Others		

Other Equipment	• Printer	* Quantity and specifications	
	• Camera		
	• Recorder		
	• Others		

Travel and Transportation		Details	Status
	• Transportation requirements	* Travel requirements and of training team and participants * Attach travel and transportation plan	
	• Payment for transportation	* Transportation providers and cost * Payment schedule	
	• Per diem and/or allowances	* Allowances for participants and training team * Indicate names and amounts	

Communication/ Documentation		Details	Status
Participants, Resource Persons, Guests	• Invitation to participants	* List of participants * Means of communication (e.g., memorandum, email, etc.) * Date for release of communication	
	• Communication to participants' superior(s)	* Means of communication (e.g., memorandum, email, etc.) * Date for release of communication	
	• Invitation to resource persons and documenter	* Means of communication (e.g., memorandum, email, etc.) * Date for release of communication	
	• Terms of reference/ Contract for signing	* Terms of reference and contract for signing of invited resource persons and documenter	
	• Payment for resource persons and documenter	* Professional fees * Payment schedule	
	• Invitation to guests	* Names of guests to opening, closing and other important activities during program * Means of communication (e.g., memorandum, email, etc.) * Date for release of communication	

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Provincial Government of Aklan. *PG Aklan Learning and Development Manual*. Vol. 3. Manila.

APPENDIX 7

Sample Monitoring and Evaluation Plan Template

Title of Training Program:

Date of Conduct:

Evaluation Level	Objectives	Indicators (What will be measured?)	Evaluation Type	Methods/ Tools	Data Sources	Timeline	Responsible Person(s)
Level 1: Reaction							
Level 2: Learning							
Level 3: Application							
Level 4: Results							

Source: Adapted from Philippines–Australia Human Resource and Organisational Development Facility and Provincial Government of Aklan. *PG Aklan Learning and Development Manual*. Vol. 2. Manila.

APPENDIX 8

Sample Structured Learning Exercise Material

CHANGE is COMING!

Theme: Recognizing responses to change

Objective: For participants to identify varied responses to change and possible ways to manage these responses

Time required: 20 minutes

Facilitator's Notes

Preparation

1. Facilitator's instructions on the series of changes to be asked of the participants.
2. A piece of paper and a pencil or pen for each participant.
3. Timer or watch with second hand.

Administering the exercise

1. The goal: In the span of 3 minutes, participants should be able to experience a series of changes that will be triggered by the facilitator's instructions.
2. Facilitator's instructions:
   a. State the goal of the exercise: "In a span of 3 minutes, I will be giving you a series of instructions that will require you to make some changes. You are to accomplish each task when instructed."
   b. Ask the participants to sit comfortably.
3. Start giving the instructions:
   a. First task: "Exchange seats with the person in front of you. Do not take anything with you." (Allow them to settle down before giving the next instruction.)
   b. Second task: "Remove your watch (or bracelet) and transfer it to the other wrist. Feel your watch or bracelet in its new position."
   c. Third task: "Take off your shoes. Wear your left shoe on your right foot and vice versa. Make a mental note of how your feet feel in their 'new' shoes."
   d. Fourth task (Give each participant a piece of paper and pencil.): "Divide your paper into two by folding it lengthwise. In a while, I will ask you to sign your name (using your regular signature) as many times as you can in 30 seconds. Use the left half of your paper for this. Are you ready?" (Give the go signal for participants to start, and time the activity. Ask them to put their pens down after 30 seconds.) "Please count how many signatures you were able to make and write the number on the upper left hand corner of your paper.

Now, I would like you to sign your names again on the right half your paper. This time, you will use your other hand (i.e., if you are right-handed, use your left hand; if you are left-handed, use your right hand). Are you ready? (Give the go signal for participants to start, and time the activity. Ask them to put their pens down after 30 seconds.) "Please count how many signatures you were able to make and write the number on the upper right hand corner of your paper."

5. Close the Activity portion by thanking the participants for carrying out the different tasks. Transition to the processing phase by saying: "Now, let us talk about your experiences."

Processing the exercise

1. Please make sure that you have trigger questions that will guide the participants in the Analysis, Abstraction, and Application stages of the "Four As" cycle. Try to solicit responses from as many participants as you can.
2. Possible trigger questions:
   a. Analysis (Write down the responses of participants on an easel sheet or whiteboard or request a co-facilitator to do this.):
      - How did you feel when I asked you to change seats?
        - When I asked you to transfer your watches or bracelets to the other wrist?
        - When I asked you to switch shoes?
        - When I asked you to sign your names using your nondominant hand? What happened? (How many signatures did you make with your dominant hand? With your nondominant hand?)
      - In which of the changes did you feel most challenged or uncomfortable? Why?

   b. Abstraction:
      Some trigger questions:
      - What insights do you have from the activity?
      - What happens when change is introduced in the way we do things?
      - What types of change are more challenging or difficult? How do people respond to changes?
      - What is the effect of change to people's behavior and performance?

      Note: You may support the participants' abstraction by sharing inputs on "Change and People's responses to change"

   c. Application:
      - What changes are you experiencing now in the workplace? How have people been responding to the change(s)?
      - What can you do to effectively manage these responses to enhance support for the organizational change initiative(s)?

Source: C. Panadero. Structured Learning Exercise: Change is Coming! Unpublished.

APPENDIX 9

Sample Management of Learning Activities

The following Management of Learning activities may be used at the end of the day, or before starting another training day. The reference is always the previous set of inputs and activities.

Participants are given some time to work individually and share their responses in small groups or in plenary. Another option is to give time for groups to present their reflections creatively.

Objective–Reflective–Interpretive–Decisional

Objective–Reflective–Interpretive–Decisional (O–R–I–D) is a form of focused conversation between or among learners. It aims to provide opportunity for learners to revisit a shared experience (e.g., training session), reflect on the effect on them and in the process, gain a deeper understanding of the experience.

Objective	• What events did you experience or observe? • What facts or information did you pick up?
Reflective	• How did you feel? What thoughts did you have? • What was most encouraging? Challenging?
Interpretive	• What insights did you have? • What good news can we celebrate?
Decisional	• What decisions and next steps can you take? • What action plan do you propose?

Reflection Window

The Reflection Window Management of Learning exercise guides learners in revisiting the previous set of training sessions and identifying specific learning areas. Learners are also triggered to think of actions they will take as a result of their learning.

What about the past sessions "squared" (validated or confirmed) with what you already knew?	What did you see from a new angle?
What did you learn that was new, which completed a circle of knowledge?	What new direction and actions will you take?

Triggers for Reflection

The Triggers for Reflection in the table can be given to learners to aid the individual reflection process. Reflections can then be shared in small groups and then in plenary.

The Event...	My Reaction...	The Outcomes
• When I heard • When I saw • When I read • When ... said... • When our group... • As I was ...	• I felt ... because I discovered ... • I realized ... • I wondered about ... • I began to understand... • I said ...	• As a result, I... • Therefore, I will... • I plan...

Source: Development Academy of the Philippines. 1987. Towards being an Effective Group Facilitator: A Documentation Study of the First Facilitator's Training Workshop. Unpublished.

APPENDIX 10

Sample Evaluation Forms

Level 1

EVALUATION FORM

Title of the Activity: ____

Date: ___ /___ /______ Venue: ________________________

Sex: ___ Male ___ Female

Please tick the office being represented:

	DSWD Field Office (FO)		People's Organization
	DSWD Central Office (CO)		Volunteers
	Centers and Institutions (CIS)		Academe
	Local Government Unit (LGU)		Religious
	National Government Agency (NGA)		Business Sector
	Nongovernment Organization (NGO)		Media

Please evaluate this activity by checking the appropriate rating:

1 Poor	2 Fair	3 Satisfactory	4 Very Satisfactory	5 Excellent

AREAS	1	2	3	4	5
1. How well activity objectives were met					
2. Extent the activity has met your needs so far					
3. Relevance of activity to improve job					
4. Usefulness of handouts and training aids					
5. Appropriateness of training methodologies					
6. Opportunities to participate in discussions					
7. Schedule of activities					
8. Effectiveness of training management					
9. Logistics					
a. Meals					
b. Accommodation					
c. Function room					
d. Events and logistics support					
e. Overall evaluation of this activity					

Please tick appropriate rating for each resource person:

Resource Person		1	2	3	4	5
1						
	Mastery of Subject Matter					
	Delivery and Presentation					
	Appropriateness of Visual Aids and Handouts					
	Clarity of Discussion					
2		1	2	3	4	5
	Mastery of Subject Matter					
	Delivery and Presentation					
	Appropriateness of Visual Aids and Handouts					
	Clarity of Discussion					
3		1	2	3	4	5
	Mastery of Subject Matter					
	Delivery and Presentation					
	Appropriateness of Visual Aids and Handouts					
	Clarity of Discussion					

1. What have you learned from this activity?

2. What factors contributed to the success of this activity?

3. What are the hindering factors in the conduct of this activity?

4. What are your suggestions to improve the conduct of similar activities in the future?

THANK YOU!

Please return to the Events and Logistics team after accomplishing the form.

Level 2

Refresher Course on the Training Management Cycle

PRECOURSE ASSESSMENT

Direction:

This 20-item assessment aims to determine your level of knowledge on key content areas on Training Management at the beginning of the program. Please read the sentence stems and encircle the BEST answer from among the options.

1. Which of the following statements is TRUE about the 70-20-10 principle in learning and development?
    A. Only 70% of training participants can be expected to apply fully what they have learned back on the job, 20% will apply some of what they have learned, while 10% will forget everything.
    B. 20% of what employees learn is derived from interactions with superiors, peers, and other people.
    C. 10% of employee hours should be allotted for learning and development.
    D. 70% of a participant's capacity to retain learning is determined by motivation to learn, 20% from effectiveness of resource persons, and 10% from interest in the subject matter.

2. What is considered as the cornerstone of training?
    A. Learning Needs Analysis
    B. Lesson Plan
    C. Training Design
    D. Learning Objectives

3. Aside from Competency-based, what is the other approach to Learning Needs Analysis?
    A. Audience-based
    B. Organization-based
    C. Performance gap-based
    D. Solution-based

4. The stage in the adult learning process where the learner draws conclusions and generalizations is
    A. Abstract Conceptualization
    B. Active Experimentation
    C. Concrete Experience
    D. Reflective Observation

5. In writing terminal learning objectives, what is ABCD?
    A. Action–Behavior–Condition–Degree
    B. Action–Behavior–Condition–Develop
    C. Audience–Behavior–Condition–Degree
    D. Audience–Behavior–Condition–Develop

6. What learning domain is the focus of a training session that develops participants' ability to break down information into component parts?
    A. Absorptive
    B. Affective
    C. Cognitive
    D. Deductive

7. One of the major roles of trainers during training execution is to help learners manage their learning journey, which can be clustered into three phases:
    A. Opening, Absorbing, and Closing
    B. Opening, Absorbing, and Synthesis
    C. Unfreezing, Assimilation, and Integration
    D. Unfreezing, Assimilation, and Refreezing

8. What is the appropriate structure to use in designing a training session that will develop participants' ability to operate an equipment or machine?
    A. Problem-centered
    B. Task-centered
    C. Tool-centered
    D. Topic-centered

9. When sequencing training content, one approach is to present first the materials that are required for immediate use. This approach is called:
    A. First in-First out
    B. Immediacy
    C. Job demands
    D. Progression

10. Which of the following statements is or are TRUE about the inductive method of training?
    A. The trainer presents a principle or concept and let the learners draw possible applications.
    B. Learners discover patterns from an experience and the concept behind the patterns, and explore applications of learning.
    C. It is anchored on the premise that highly structured presentation of content leads to optimal learning.
    D. It is most appropriate when providing new inputs and perspectives.

11. Which among these learning methodologies would be the MOST appropriate to use if the learning objective focuses on developing psychomotor skills?
    A. Case study
    B. Demonstration
    C. Lecture
    D. Simulation

12. Identify all learning methodologies that are appropriate to use when learners need to assimilate new information and perspectives to help them develop a competency.
    A. Lecture
    B. Panel Discussion
    C. Role Play
    D. Structured Learning Exercise

13. Determining the advancement in knowledge, skills, and attitudes of participants as a result of a training intervention is what level of evaluation?
    A. Application
    B. Learning
    C. Behavior
    D. Reaction

14. Which of the following statements about monitoring and evaluation is NOT true?
    A. Monitoring of a training intervention alerts us to problems during implementation and provides options for corrective action.
    B. Evaluation involves analysis of the worth of a training intervention through a systematic process of collecting information on inputs, outputs, and outcomes.
    C. Monitoring can take the place of evaluation and vice-versa, when appropriate.
    D. The training team performs monitoring and evaluation tasks in all phases of the training management cycle.

15. In the training management cycle, what does "Development" refer to?
    A. Developing learning objectives
    B. Developing participants' competencies
    C. Developing the training activity plan
    D. Developing training and/or learning materials

16. Screencast is an example of what type of learning material?
    A. Computer-mediated
    B. Nonprojected display
    C. Projected display
    D. Video-based

17. Training Execution involves four clusters of key tasks: Program Management, Learning Management, Team Management, and
    A. Participant Management
    B. Risk Management
    C. Resource Management
    D. Welfare Management

18. Which of these tasks is or are part of program management?
    A. Documenting proceedings, outputs, issues, and critical incidents
    B. Facilitating debriefing sessions with training team at the end of each day to review events, and plan for succeeding sessions
    C. Preparing postprogram report
    D. Supervising and monitoring delivery of sessions

19. One of the facilitator's major roles is "Processing." Which of the following best describes the focus of this role?
    A. Facilitating integration of inputs, discussions and activities at the end of learning sessions or modules
    B. Helping participants find personal meaning of concepts and activities to enhance learning

C. Responding to issues and questions, and addressing confusion
D. Using process skills to keep sessions on track and manage learning tempo

20. Which fundamental facilitator skill helps in building rapport with participants?
    A. Attending
    B. Engaging
    C. Listening
    D. Observing

Thank you for accomplishing this questionnaire!

KALAHI-CIDSS National Community-Driven Development Program
Training Management Guidebook

This guidebook helps ensure that community training investments are optimized and yield the desired results. It provides learning facilitators with guidelines and tools for carrying out various phases of the training management cycle, including analysis, design, development, execution, monitoring, and evaluation. The guidebook was developed as part of the Department of Social Welfare and Development's *Kapit-Bisig Laban sa Kahirapan*—Comprehensive and Integrated Delivery of Social Services National Community-Driven Development Program, which conducts training to plan for and participate in community change initiatives in the Philippines.

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ASIAN DEVELOPMENT BANK
6 ADB Avenue, Mandaluyong City
1550 Metro Manila, Philippines
www.adb.org